



FEI Systems



State Opioid Response (SOR) Grant

*Standard SOR End
User Guide*

Applies to:

WITS Version 19.9.0

WITS Customers

Last Updated August 2020

Version 4

WITS Customers

State Opioid Response (SOR) Grant

Preface

“The State Opioid Response (SOR) program aims to address the opioid crisis by increasing access to medication-assisted treatment using the three FDA-approved medications for the treatment of opioid use disorder, reducing unmet treatment need, and reducing opioid overdose related deaths through the provision of prevention, treatment and recovery activities for opioid use disorder (OUD) (including prescription opioids, heroin and illicit fentanyl and fentanyl analogs).”¹

Intended Audience

This Standard SOR user guide has been prepared for provider agency staff members delivering SOR services to individuals. Information included will assist providers in understanding the standard WITS SOR system and the data entry requirements for the SOR grant.

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer (*recommended*)

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated.

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer URL Link

Production Site: <https://pa.witsweb.org/Public/>

¹ Source: <https://www.samhsa.gov/grants/grant-announcements/ti-18-015>

Documentation Updates

Version 4 (WITS 19.9.0) (Current Version)

The following topics have been added in this documentation version.

- **GPRC Follow-up Due Summary Screen** (Part 4: GPRC Interviews on page 33)
- **GPRC Follow-up Due Detail Screen** (Part 4: GPRC Interviews on page 37)
- **GPRC Discharge Due Screen** (Part 4: GPRC Interviews on page 44)
- **Intake Close Processor** (Part 1: Customer Specific Information on page 3)
- **Prepopulate Behavioral Health Diagnoses screen with Medications from Encounter** (Part 4: GPRC Interviews on page 41 and on page 47)

Version 3 (WITS 19.8.0)

The following topics have been added in this documentation version.

- Added confirmation screen upon completing GPRC Follow up interview within window to automatically create a GPRC Discharge with the same interview information. (Part 4: GPRC Interviews, on page 43)
- Added information about **GPRC Discharge Services Received** section populated with encounter information. (Part 4: GPRC Interviews, on page 49)

Version 2 (WITS 19.6.0)

The following topics have been added in this documentation version.

- **Updated Standard SOR Workflow Diagram** (Part 1: Customer Specific Information on page 1)
- **Grant Episode Concepts** (Part 1: Customer Specific Information on page 2)
- **GPRC Interviews** (Part 4: GPRC Interviews on page 27)
 - GPRC Intake Interview
 - GPRC Follow Up Interview
 - GPRC Discharge Interview

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 **Note:** Notes contain information for users to take note of, as the information may affect what the user does with the system.

 **Tip:** Tips contain information helpful to the user, such as providing an easier way to do something.

 **Important:** Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

Part 1: Customer Specific Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR program enrollment.
- The initial agency can enter GPRAs or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR workflow process.

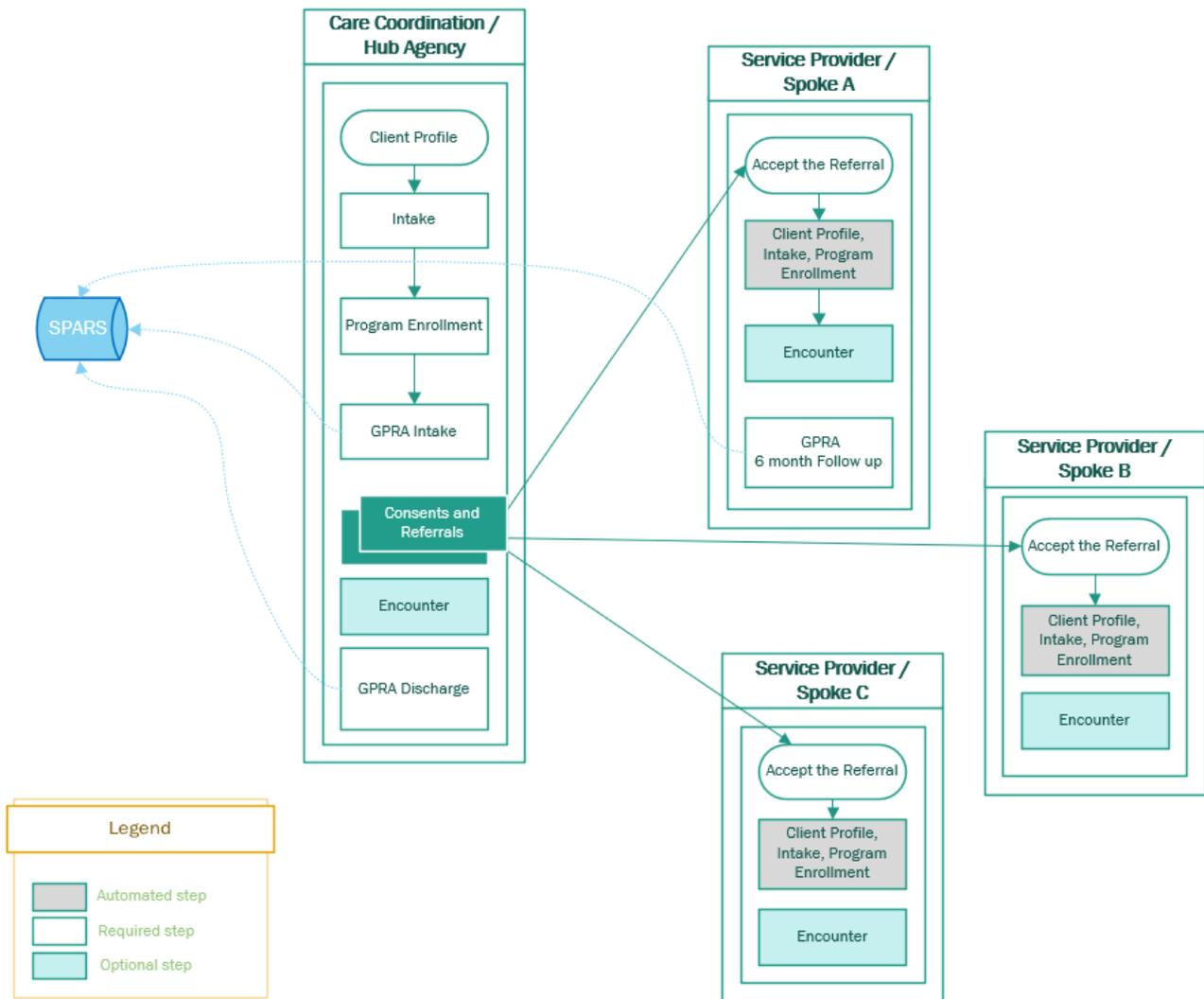


Figure 1-1: Standard SOR Workflow Diagram

Grant Episode Concepts



Where: Agency > Agency List > Facility List > Programs

Background

When a client’s GPRAs interviews are completed, they are sent to SPARS. Each type of GPRAs Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS. If the same type of GPRAs is sent twice (for example, if two GPRAs Intakes are completed), SPARS will inactivate the first GPRAs Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS now has a grant episode.

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRAs Menu Item	The ability to enter a GPRAs in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRAs (Full Access) security access role.
Grant Episode	<p>This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRAs Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRAs 6-Month Follow Up and GPRAs Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRAs Intake because the grant episode will remain assigned to this client in other agencies.</p> <ol style="list-style-type: none"> 1. The Grant Episode is created and put into a ‘Pending’ status when the Client Program Enrollment (CPE) is created for a program with a Grant field value. 2. The Grant Episode follows the client’s UCN throughout the process of creating GPRAs. 3. The ‘Pending’ grant episode will become ‘Active’ once the GPRAs Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up and Discharge interviews. 5. Once all 3 interviews are completed, the Grant Episode will have a status of ‘Closed.’ 6. Once the Grant Episode is ‘Closed’, a new ‘Pending’ Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change Grant Episode from ‘Active’ to ‘Inactive’ (this can be done upon creation of a client program enrollment within a different agency)

WITS Administrator Process

Use Case: Client with GPRAs intake at one provider goes to another provider without a WITS consent/referral

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an ‘active’ grant episode, the system will prohibit this.
 - The provider/user will be presented with a WITS error message:

⚠ There is a problem creating this client program enrollment record. Please contact your SCA administrator to resolve this conflict.

2. The WITS Administrator would then be able to determine if the client program enrollment can be added within the agency by either continuing the existing episode or creating a new episode (which will inactivate the previous episode)

Intake Close Processor

For customers only using SOR, the **Intake Close Processor** is a scheduled task that runs every night to automatically close client intakes. Client intakes will be closed when all Client Program Enrollments are for a closed or inactive grant episode and there has been no activity within that client intake (no encounters saved or updated) for a certain number of days. The default number of days is set to 45, but the number can be changed in a site's configuration.



Important: The Intake Close Processor applies to SOR only customers.

Part 2: Client Setup

Search for a Client



Where: Client List Screen

Before creating a new client record, search for your client to make sure the client is not already in WITS.

1. To view clients within your agency, click on the **Client List** menu item. A blank Client List screen will appear.
2. Use the fields in the **Client Search** section to narrow your results.

i Tip: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a “*”. This is called a **wild card search**. For instance, if you search for Last Name of “Smit*”, the search results will display people with the last name of “Smith”, “Smitty”, “Smithson”, etc.

3. After selecting from the search fields, click **Go** to view the results.

The screenshot shows the 'Client Search' interface. On the left is a navigation menu with 'Client List' selected. The main area contains search filters for Agency (ATR4 Coordinator Agency), Facility, First Name, Last Name, SSN, DOB, Massachusetts Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status (Clients with ATR4 Cases), Intake Staff, Other Number, and Number Type. There is an 'Include Only Active Consents' checkbox set to 'Yes'. 'Clear' and 'Go' buttons are at the bottom right of the search section.

Below the search section is a table titled 'Client List (Export)' with an 'Add Client' link. The table has columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. Two rows are visible:

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	P402930ED339433	Abare, Donald	1/7/1966	001-27-0007	Male
	P902188RG881433	Doe, John	6/7/1988	564-78-5555	Male

A tooltip is shown over the pencil icon for the second row, containing links for 'Profile', 'Activity List', and 'Linked Consents'.

At the bottom is a section titled 'Clients with Consents from Outside Agencies' with a table that is currently empty.

Figure 2-1: Client List screen, Action links

4. Look for your client in the **Client List**. If you find the right person, view their profile by pointing to the pencil icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record by clicking the Add Client link.

Client Search Tips

Client Name or Number

Use a client’s nickname or alternate names in the **First Name** or **Last Name** fields.

Use an **asterisk (*)** to perform a wildcard search.

Examples:

- Find clients whose last name starts with “Jon”: Jon*

The screenshot shows a 'Client Search' form with the following fields: Agency (Administrative), Facility (dropdown), First Name, Last Name (Jon*), SSN, and DOB. A red arrow points to the 'Last Name' field.

- Search by the last 4 digits of a client’s SSN: *1123

The screenshot shows a 'Client Search' form with the following fields: Agency (Administrative), Facility (dropdown), First Name, Last Name, SSN (*1123), and DOB. A red arrow points to the 'SSN' field.

Client Birthday or Age

Search within a timeframe by separating the two dates with a **colon (:)**. Search for clients born after a certain date with a **greater than sign (>)**. Search for clients born before a certain date with a **less than sign (<)**.

Examples:

- Find clients born in the year 1990: 1/1/1990:12/31/1990

The screenshot shows a 'Client Search' form with the following fields: Agency (Administrative), Facility (dropdown), First Name, Last Name, SSN, and DOB (1/1/1990:12/31/1). A red arrow points to the 'DOB' field.

- Find clients born after a certain date: >12/30/1959

Create Client Profile



Where: *Client List > Client Profile*

To add a new client to the system, follow the steps below.

Note: Please search for each client before creating a new record.

1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.

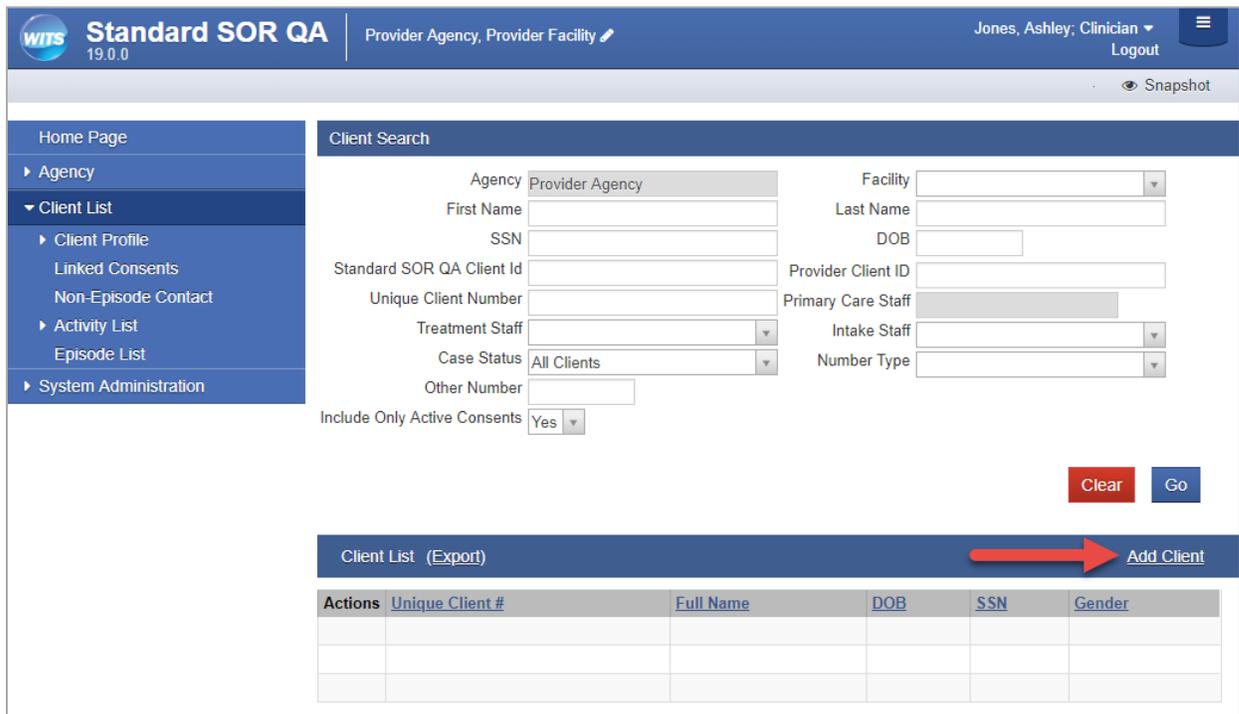


Figure 2-2: Client Search/List screen; Add Client link

3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

Important: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Table 2-1: Client Profile fields

Field	Description
Current First Name	Type the client’s current first name.
Middle Name	(Optional)
Current Last Name	Type the client’s current last name.
Mother’s Maiden Name	(Optional)

Field	Description
Suffix	(Optional)
Birth First Name	Type the client's birth first name.
Birth Last Name	Type the client's birth last name.
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the client's Social Security Number. If the Social Security Number is not Known, enter all 0's.
Driver's License and State	(Optional) Type the number and then select the State from the drop-down list.
Has paper file	(Optional) Select Yes or No. Field defaults to Yes.
Provider Client ID	(Optional)

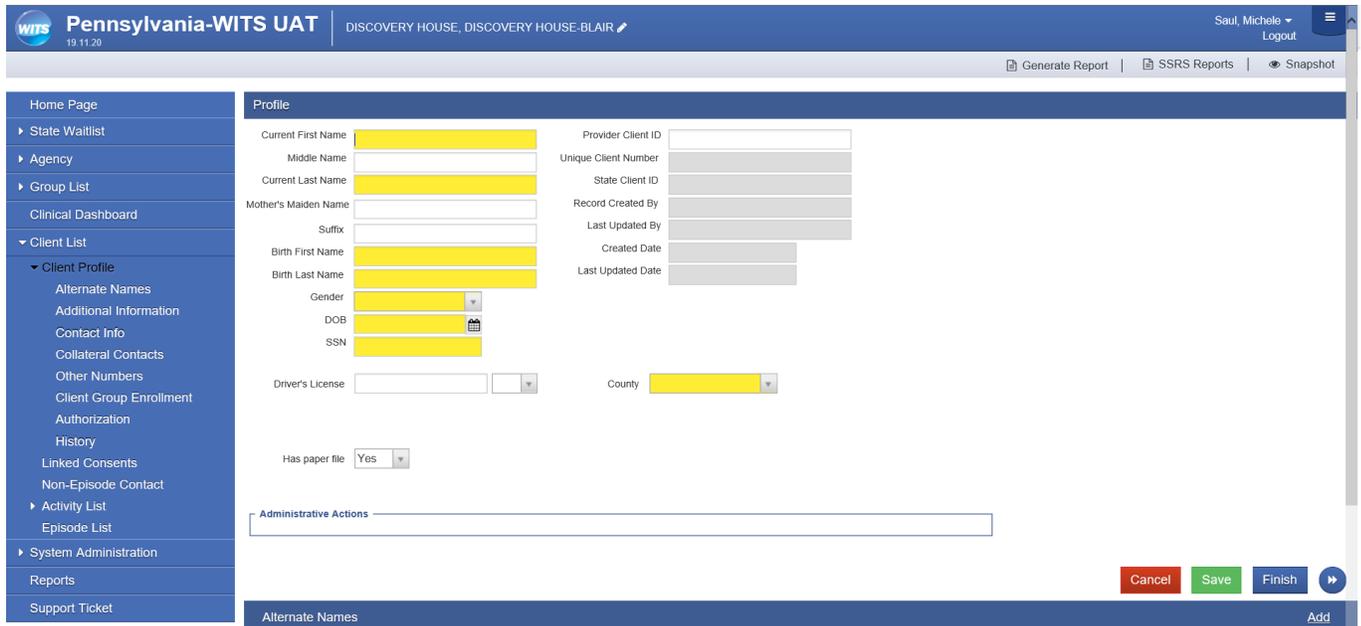


Figure 2-3: Client Profile screen

4. Click **Save**.
5. Click the **right-arrow** to move to the **Alternate Names** screen.

Alternate Names

The client's nickname or street name may be entered on this screen

- i Tip:** Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

1. On the Alternate Names screen, click **Add Alternate Name**, and the bottom half of the screen becomes editable.

The screenshot shows the 'Alternate Names' screen. At the top is a table with columns: Actions, Last Name, First Name, Middle Name, and Client Alias Type. Below the table is a dark blue bar with the text 'Add Alternate Name' on the right. A red arrow points to this button. Below the bar are four input fields: First Name, Middle Name, Last Name, and Client Alias Type. At the bottom are buttons for Cancel, Save, Finish, and two navigation arrows.

2. Complete at least the **First Name** field.

The screenshot shows the 'Alternate Names' screen after the 'Add Alternate Name' button is clicked. The 'First Name' field now contains the text 'Johnny' and is highlighted in yellow. The 'Middle Name' field is empty. The 'Last Name' and 'Client Alias Type' fields are also empty. The 'Cancel' and 'Finish' buttons are visible at the bottom.

3. Click **Finish**. The name will now appear in the list at the top of the screen.
4. From the Alternate Names screen, click the **right-arrow** button to open the **Additional Information** screen.

Additional Information

1. On the **Additional Information** screen, complete the light-yellow fields.

Table 2-2: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Have you ever served in the Armed Forces, in the Reserves, or in the National Guard?	Select from the drop-down list.

Figure 2-4: PA-WITS SOR screen

2. When complete, click **Save**, then click the **right-arrow** button to open the **Contact Info** screen.

Contact Info

Tip: Enter the client’s contact information on this screen to help locate the client for follow-ups.

1. On the **Contact Info** screen, a phone number can be entered for the client.
2. To enter an address, click **Add Address**. This will open the Address Information screen.

Figure 2-5: Contact Info screen

3. Enter the client’s Address Type, Address line 1, City, State, and Zip Code.

Figure 2-6: Address Information screen

4. When complete, click **Finish**, and the client’s address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to “Previous”, then create a new address.
5. From the **Contact Info** screen, click the **right-arrow** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

1. On the **Collateral Contacts** screen, click the **Add Contact** link.

The screenshot shows the 'Collateral Contacts' interface. At the top is a table with columns: Actions, First Name, Last Name, Relation, Phone Numbers, and Can Contact?. Below the table is a dark blue bar with a red arrow pointing to the 'Add Contact' link. The form below contains the following fields:

- First Name, Last Name, Relation, Custodian, Gender, Date of Birth, Home Phone, Work Phone, Mobile, Fax, Other, Legal Guardian, Active Date, Inactive Date
- SSN
- Address 1, Address 2, City, State, Zip, Email
- Can Contact, Consent On File, Notes (text area), Created, Last Update

At the bottom right are buttons for Cancel, Save, Finish, and navigation arrows.

Figure 2-7: Collateral Contacts screen, click Add Contact

2. Enter the required client information. See the table below for information on the required fields.

Table 2-3: Collateral Contacts required fields

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, City, State	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

Collateral Contacts					
Actions	First Name	Last Name	Relation	Phone Numbers	Can Contact?

[Add Contact](#)

First Name

Last Name

Relation

Gender

Home Phone

Work Phone

Mobile

Fax

Other

Legal Guardian

Active Date

Inactive Date

Address 1

Address 2

City State Zip

Email

Can Contact

Consent On File

Notes

Created

Last Update

Figure 2-8: Add Collateral Contacts screen

3. When complete, click **Finish**. The collateral contact name(s) will be displayed in the list section of the screen.
4. From the **Collateral Contacts** screen, click the **right-arrow** button to open the **Other Numbers** screen.

Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

1. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.
2. Fill in information such as, Number Type, Number, Relation, and Address of the contact.

The screenshot shows the 'Other Numbers' screen. At the top is a table with columns: Actions, Number Type, #, Start, End, Contact Name, and Status. Below the table is a blue header for the 'Add Other Number' form. The form contains the following fields:

- Number Type: dropdown menu
- Number: text input field
- Start Date: date picker (11/26/2014)
- End Date: date picker
- Status: dropdown menu (Active)
- Contact: dropdown menu
- Comments: text area

At the bottom right of the form are 'Cancel' and 'Finish' buttons.

Figure 2-9: Other Numbers screen

3. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.

This screenshot shows the 'Add Other Number' form with the 'Contact' dropdown menu open. The dropdown list displays 'Smith, Jane'. The other fields in the form are filled with the same data as in Figure 2-9: Number Type, Number, Start Date (12/11/2014), End Date, Status (Active), and Comments.

Figure 2-10: Other Numbers screen, saved collateral contact

4. When complete, click **Finish**. The names now show up in the table on top of the screen.

Client Group Enrollment

A client group enrollment (CGE) must be entered for each client. This will identify the funding source for the client. If the client is not being funded by an SCA, there is a "No SCA" option that can be selected. The CGE can be updated as funding sources change.

1. Click **Add Government Contract Enrollment**

Payor List							Add Government Contract Enrollment	
Actions	Priority	Plan	Group	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date	

2. Select the Contract, or funding source, from the drop-down menu. The options will be an SCA that the provider contracts with or No SCA.

The Plan-Group field will auto populate with the appropriate information based on the Contract selected.

The Subscriber # will auto populate with the client's UCN.

Government Contract Billing Information

Plan Type: Government Contract

Contract:

Plan-Group:

Subscriber #: W42502019158130

Payor Priority Order: 1

Start Date:

End Date:

Administrative Actions:

Cancel
Save

3. Enter the Start Date, which is the date the selected funding source will begin covering services.

4. Click **Save**

5. On the Payor List, click **Finish**, and you will be returned to the Client Search.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.

Mouse, Minnie M20007030036580 Snapshot	
Client History (Export)	
Date Changed	Description of Changes
10/12/2017 12:19 PM	<ul style="list-style-type: none"> Accessed Client Profile Screen
10/12/2017 12:19 PM	<ul style="list-style-type: none"> Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/7/2017 9:38 AM	<ul style="list-style-type: none"> Discharge was added.
7/7/2017 9:38 AM	<ul style="list-style-type: none"> Accessed Discharge Screen for Case: 1
7/7/2017 9:37 AM	<ul style="list-style-type: none"> Client Program Enrollment was changed.
7/7/2017 8:33 AM	<ul style="list-style-type: none"> Accessed Admission Screen for Case: 1
7/7/2017 8:33 AM	<ul style="list-style-type: none"> Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 3:01 PM	<ul style="list-style-type: none"> Accessed Client Profile Screen
7/6/2017 2:43 PM	<ul style="list-style-type: none"> Client Program Enrollment was added.
7/6/2017 2:42 PM	<ul style="list-style-type: none"> Outcome Measure was changed.
7/6/2017 2:39 PM	<ul style="list-style-type: none"> Client Diagnosis was changed.
7/6/2017 2:38 PM	<ul style="list-style-type: none"> Accessed Outcome Measures - Client Diagnosis for Case: 1
7/6/2017 2:38 PM	<ul style="list-style-type: none"> Outcome Measure was added.
7/6/2017 2:38 PM	<ul style="list-style-type: none"> Outcome Measure was added.
7/6/2017 2:37 PM	<ul style="list-style-type: none"> Accessed Outcome Measures - Client Status for Case: 1
7/6/2017 2:37 PM	<ul style="list-style-type: none"> Accessed Outcome Measures for Case: 1
7/6/2017 2:37 PM	<ul style="list-style-type: none"> Admission was added.
7/6/2017 2:36 PM	<ul style="list-style-type: none"> Accessed Admission Screen for Case: 1
7/6/2017 2:36 PM	<ul style="list-style-type: none"> Client Intake Record was created.
7/6/2017 2:36 PM	<ul style="list-style-type: none"> Accessed Intake Screen
7/6/2017 2:36 PM	<ul style="list-style-type: none"> Address 'PO BOX 678' added.
7/6/2017 2:35 PM	<ul style="list-style-type: none"> Veteran Status changed from " " to 'No'. Ethnicity changed from " " to 'Not of Hispanic Origin'. Race 'Black or African American' added.
7/6/2017 2:35 PM	<ul style="list-style-type: none"> Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 2:35 PM	<ul style="list-style-type: none"> Client 'Mouse, Minnie' added.

Figure 2-11: Client History screen

Linked Consents



Where: *Client List > Clients with Consents from Outside Agencies*

Each time another agency consents client information to your agency, a row will be displayed on the “**Clients with Consents from Outside Agencies**” section of the **Client List** screen. Always look at the linked consents first to make sure you don’t already have that client entered.

If the consent is sent along with a referral and the referral is accepted at the referred to agency, users with a Clinical Supervisor role may manually link and unlink consents. This action is available when it is clear that a client with consented information is in fact the same person as a client that exists in the agency. They may not have been automatically linked because the names or other identifying information may have been different in the sending agency than they are in the receiving agency.

The screenshot shows the 'Client List' interface. On the left is a navigation menu with options like 'Home Page', 'Agency', 'Clinical Dashboard', 'Client List', 'Client Profile', 'Linked Consents', 'Non-Episode Contact', 'Activity List', 'Episode List', and 'System Administration'. The main area is titled 'Client Search' and contains various input fields for Agency, Facility, First Name, Last Name, SSN, DOB, PA-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Intake Staff, Other Number, and Number Type. There are 'Clear' and 'Go' buttons. Below the search area is a table titled 'Client List (Export)' with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table lists several clients. At the bottom, a section titled 'Clients with Consents from Outside Agencies' is highlighted with a red box and a red arrow. This section contains a table with columns for Actions, Agency, Unique Client #, Client Name, DOB, SSN, and Gender, showing one client from 'GREENBRIAR TREATMENT CENTER'.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	200006018756780	2, Deeksha Test	6/1/1987	213-12-5678	Female
	A23608019956780	Asteraceae, Zinnia	8/1/1999	012-34-5678	Female
	B00009078465980	Bee, New	9/7/1984	852-31-6598	Male
	B60007108274830	Berry, Blue	7/10/1982	090-44-7483	Male
	B60007107298760	Berry, Straw	7/10/1972	173-84-9876	Male
	B00007020355550	Boy, Teen	7/2/1972	123-12-5555	Male

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender
	GREENBRIAR TREATMENT CENTER	F62308138722220	Forrest, Bobby	8/13/1987	121-11-2222	Male

For example:

A client named “Bobby” is referred into your agency from an outside agency. Your agency already has a record for a client named “Robert”. The Linked Consents screen allows you to compare the New/Referred Client Information (Bobby) with the Existing Client Information (Robert). Using this screen, you can tell that Robert and Bobby are the same person and these two profiles can be linked together so the same client won’t have two different client profiles within the same agency.

Link to Consented Client

1. On the left menu, click **Client List** and then click **Go**.
2. In the **Clients with Consents from Outside Agencies** section, hover over the Actions column and click **Link**.

The screenshot shows the 'Client Search' interface with various filters. Below the search area is a table titled 'Client List (Export)' with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table lists several clients. Below this is a section titled 'Clients with Consents from Outside Agencies' with columns: Actions, Agency, Unique Client #, Client Name, DOB, SSN, and Gender. A red arrow points to the 'Link' button in the Actions column for the client 'Forrest, Bobby' at 'GREENBRIAR TREATMENT CENTER'.

Figure 2-12: Client List screen, Clients with Consents from Outside Agencies section, Link action item

3. The **Link Client Search** screen will appear and the Consented Client information is displayed as read-only fields.

The screenshot shows the 'Link to Consented Client' screen. At the top, it displays the client's information: Full Name: Forrest, Bobby; DOB: 8/13/1987; Client Number: F62308138722220; SSN: 121-11-2222. Below this is the 'Link Client Search' form, which includes fields for Agency (Administrative Agency), Facility, First Name, Last Name, SSN, DOB, Unique Client Number, Provider Client ID, Other Number, and Number Type. There are 'Clear', 'Cancel', and 'Go' buttons at the bottom right. Below the form is a table with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender.

Figure 2-13: Link Client Search screen

- 4. Use the search fields to find a client with similar information. It is helpful to copy and paste some of the consented client's information into the search fields. The example in Figure 2-14 uses the Consented Client's Unique Client Number in the search field.

The screenshot shows a web interface with a sidebar on the left containing navigation options: Home Page, Agency, Clinical Dashboard, Client List (expanded), Client Profile, Linked Consents, Non-Episode Contact, Activity List, Episode List, and System Administration. The main content area is titled 'Link to Consented Client' and displays client details: Full Name (Forrest, Bobby), Client Number (F62308138722220), and DOB (8/13/1987). Below this is the 'Link Client Search' section with input fields for Agency (Administrative Agency), Facility, First Name, Last Name, SSN, DOB, Unique Client Number (F62308138722220), Provider Client ID, and Other Number. A red arrow points to the Unique Client Number field. At the bottom right are 'Clear', 'Cancel', and 'Go' buttons. Below the search fields is a table with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender.

Figure 2-14: Link Client Search screen, search by Unique Client Number

- 5. After filling out one or more search fields, click **Go** and then review the search results.

This screenshot is similar to Figure 2-14 but shows the search results. The 'Unique Client Number' field is now populated with 'F62308138722220'. The 'Go' button has been clicked, and the table below now contains one row of results: Unique Client # (F62308138722220), Full Name (Forrest, Robert), DOB (8/13/1987), SSN (121-11-2222), and Gender (Male). The 'Actions' column contains a pencil icon.

Figure 2-15: Link Client Search screen with search results

- 6. If the information in the search results matches the Consented Client information, hover over the Actions column and then click **Link**.

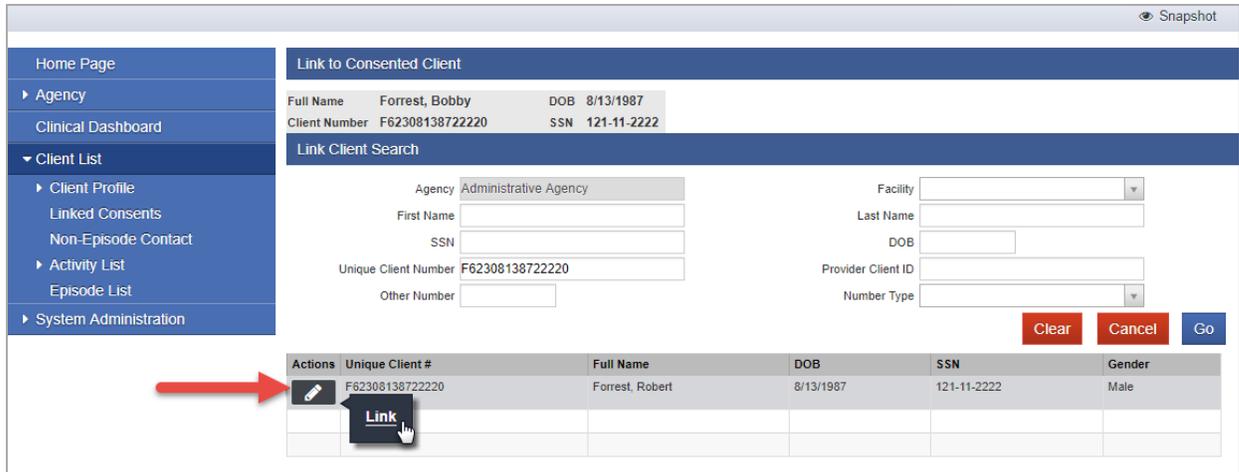


Figure 2-16: Link Client Search screen, Link Consent record

7. Click **Yes**.



Figure 2-17: Are you sure you want to link current consented client to the consent client

8. The client's Linked Consent screen will now display the consent record from the other agency.

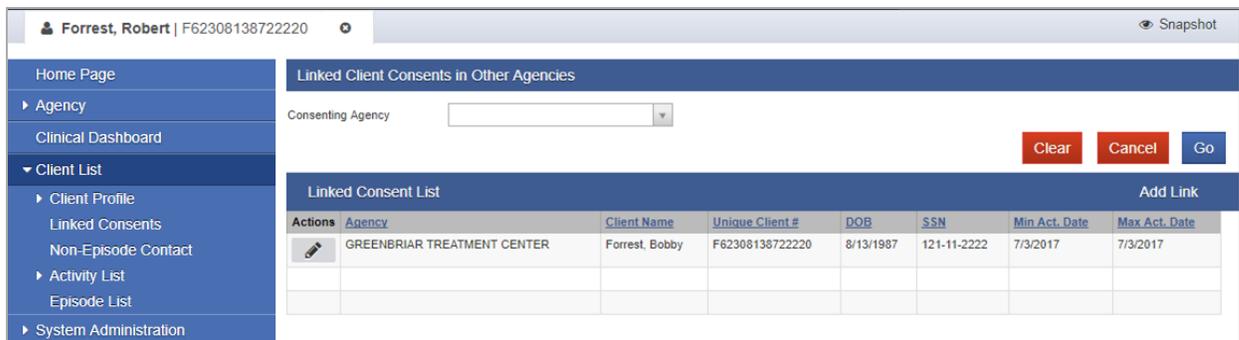


Figure 2-18: Linked Consents screen

Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode (these fields are shown in *Figure 3-6: Intake Case Information screen* on page 24).

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

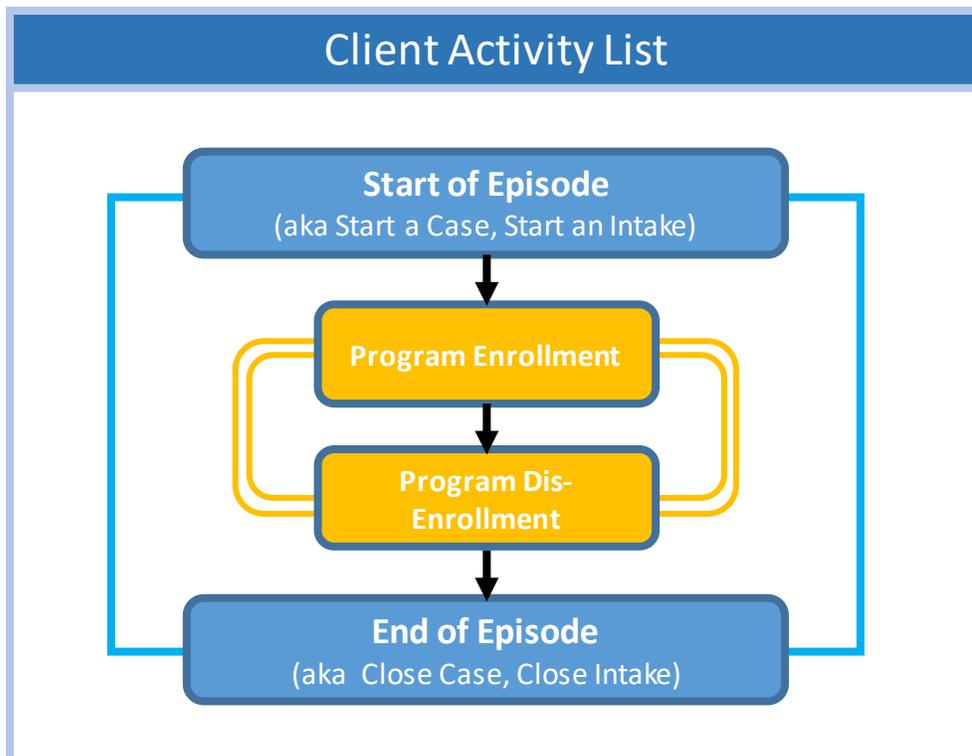


Figure 3-1: Concept Diagram of Data Collection Structure within Client Activity List

The **Client Activity List** can serve as a "dashboard" view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to a following activity. Validation rules will guide you throughout the workflow as you enter new data.

i To access items within the Activity List, a client must be selected first.

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	6/23/2017	6/30/2017	Completed
	Intake Transaction	6/23/2017	6/30/2017	Completed
	Screening Tool	6/23/2017	6/30/2017	Completed
	Admission	6/30/2017	6/30/2017	Completed
	Outcome Measures - Client Status (Initial)	6/30/2017		In Progress (Details)

Figure 3-2: Client Activity List, Details link



Figure 3-3: Details link, list of missing information

i Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

Start New Episode (New Clients)



Where: [Client List](#) > [Activity List](#) > [Episode List](#)

In WITS, all items located in a client’s Activity List are based upon an active Episode of Care. In the screen capture below, note the Activity List in the left menu only displays one item, “Episode List”. An episode must be created before accessing other items in the client’s Activity List.

To start a new episode of care for a client, follow the steps below.

1. On the left menu, click **Episode List**.
2. Click the **Start New Episode** link.

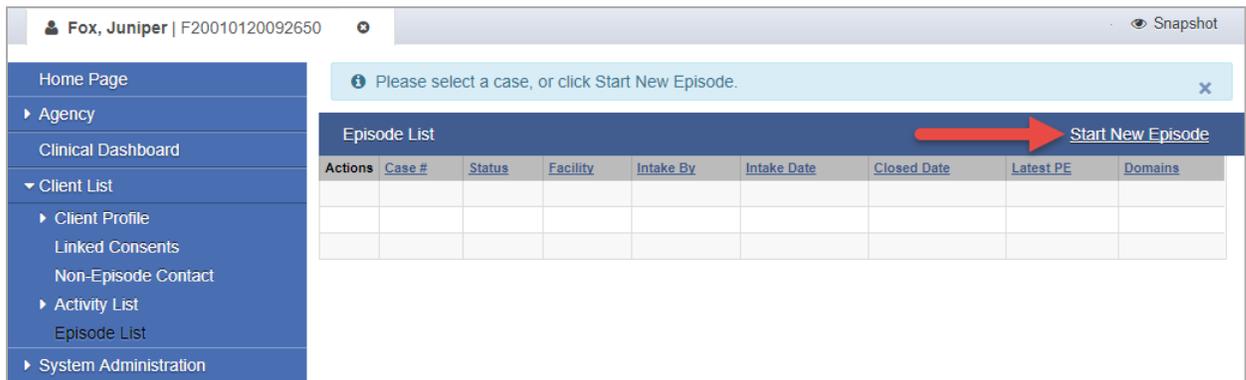


Figure 3-4: Episode List screen, Start New Episode link

If the client profile is missing certain information, such as an Address or fields on the Additional Information screen, a New Episode cannot be created and an error message will appear, as shown in Figure 3-5.



Figure 3-5: Episode List screen, Error Message

If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-6: Intake Case Information screen.

(Continue to next section)

Intake



Where: *Client List > Activity List > Intake*

Once an episode of care has been created (see above section), complete the client's intake.

1. On the Intake Case Information screen, complete the fields as shown in the table below.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Initial Contact	Select from the drop-down list.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode).
Source of Referral	Select from the drop-down list.
Funding SCA	Pre-populates based upon Client Group Enrollment
Referral Contact	(Optional) Select from a list of the client's collateral contacts.
Pregnant	Is the client pregnant at the time of admission? Complete if applicable.
Injection Drug User	Select Yes or No.
Problem Area	(Optional)
Presenting Problem (In Client's Own Words)	(Optional)
Special Initiatives	Required.
Inter-Agency Service	(Optional)
Selected Domains	This field will be pre-populated and read-only if there is only one domain associated with the agency. If the agency has multiple domains, select the appropriate domain(s) for the client.
Date Closed	The Date Closed field is used to mark the end of the client's Episode.

Date Closed  [Save & Close the Case](#)

Pennsylvania-WITS UAT
19.11.20
DISCOVERY HOUSE, DISCOVERY HOUSE-BLAIR

Rubble, Barney | R14003055067440 | 1

- Home Page
- ▶ State Waitlist
- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- ▼ Client List
 - ▶ Client Profile
 - ▶ Linked Consents
 - ▶ Non-Episode Contact
 - ▶ Activity List
 - Intake
 - Screening Tool
 - ▶ Assessments
 - ▶ ASAM
 - ▶ PCPC Summary
 - ▶ Admission
 - ▶ Outcome Measures
 - Program Enroll
 - Diagnosis List
 - ▶ Encounters
 - ▶ Notes
 - ▶ Drug Testing
 - Tx Team
 - Treatment Plan
 - ▶ Discharge
 - ▶ Recovery Plan
 - Consent
 - GPRA

Intake Case Information

Intake Facility	DISCOVERY HOUSE-BLAIR		Case #	1
Intake Staff	Saul, Michele		Case Status	Open Active
Initial Contact	Phone		Initial Contact Date	10/1/2019
Is Client Public Funded?			Intake Date	10/1/2019
Funding SCA	Blair County Drug and Alcohol Program, Inc.		Pregnant	Not Applicable
Source of Referral	Hospital/Physician		Due Date	
Referral Contact			Prenatal Treatment	
	Add Collateral Contact		Injection Drug User	No
Scheduled Assessment Date	10/2/2019		Problem Area	
Assessment Date	10/2/2019		Presenting Problem (In Client's Own Words)	
If assessment cannot be scheduled within 7 days, why?				
Did client complete scheduled assessment?	Yes			
Why was scheduled assessment missed?				
Scheduled Admission Date	10/3/2019			

Special Initiatives/Populations None Buprenorphine Methadone Student Assistance Program Women w/ Children	Special Initiatives/Populations Selected Veteran Vivitrol
--	---

Inter-Agency Service Child Protective Services (OCS) Court/Legal Interface Developmental Disabilities Domestic Violence Faith-Based Services	Inter-Agency Service Selected
---	-------------------------------

Figure 3-6: Intake Case Information screen

3. Click **Finish**.

Program Enroll



Where: [Client List](#) > [Activity List](#) > [Program Enroll](#)

Once an Intake has been created (see above section), complete the client’s program enrollment.

1. On the left menu, click **Program Enroll**.
2. Click the **Add Enrollment** link.

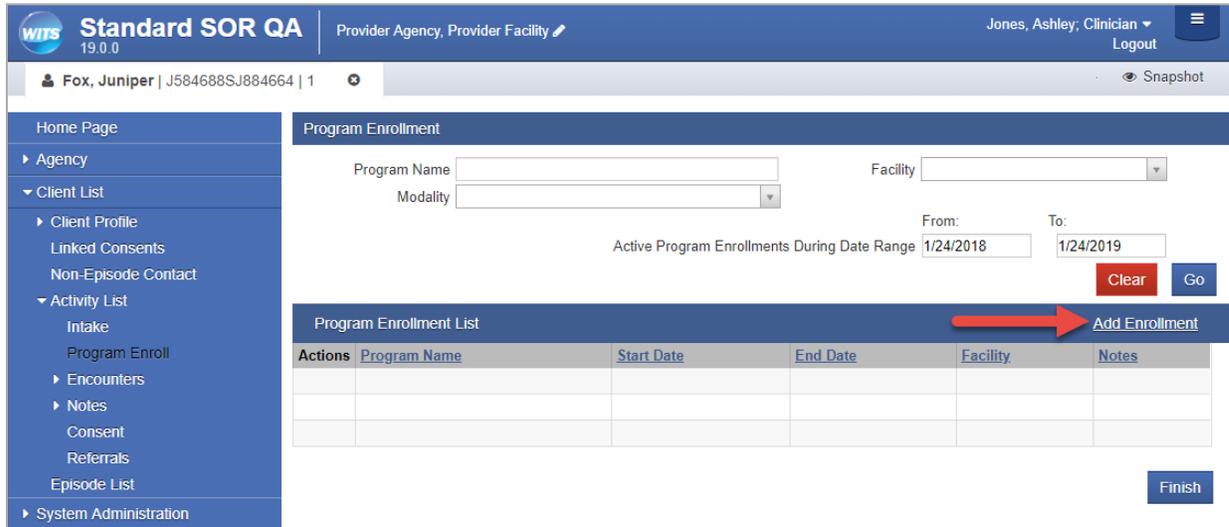


Figure 3-7: Program Enrollment screen

3. Complete fields on the Program Enrollment Profile.

Table 3-2: Program Enrollment Profile fields

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate program for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days.
Reason for waiting? (TEDS Only)	<p>If the client had to wait longer than two weeks to access the recommended level of care, select the reason from the drop-down list.</p> <p>This field will be required if:</p> <ul style="list-style-type: none"> • The program enrollment start date is more than 14 days from the most recent ASAM or Placement Summary date. • The LOC associated with the program is different than the Recommended LOC of the most recent ASAM or Placement Summary (consented or client activity).
Notes	Type any notes as needed.

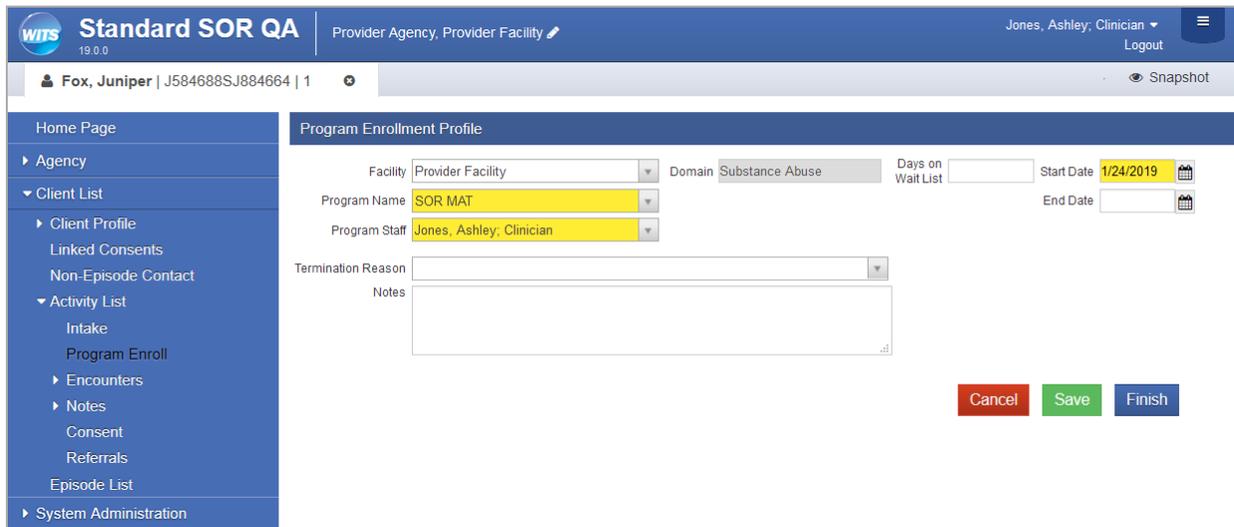


Figure 3-8: Program Enrollment Profile screen

4. Click **Finish**.
5. On the Program Enrollment screen, click **Finish**.

Part 4: GPRA Interviews



Where: [Client List](#) > [Activity List](#) > [GPRA](#)

To access the GPRA section in WITS, select a client from the Client List and then view the client’s Activity List. The GPRA section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in *Table 4-1: Available Actions for GPRA Interviews*.

⚠ Important: The GPRA menu item will only appear if:

1. The staff member completing the GPRA interview has been assigned the following role, “GPRA (Full Access)”. This role is assigned by your WITS or agency administrator.
2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR grant. Your WITS administrator should advise you as to which of your agencies’ programs are associated with the SOR grant.

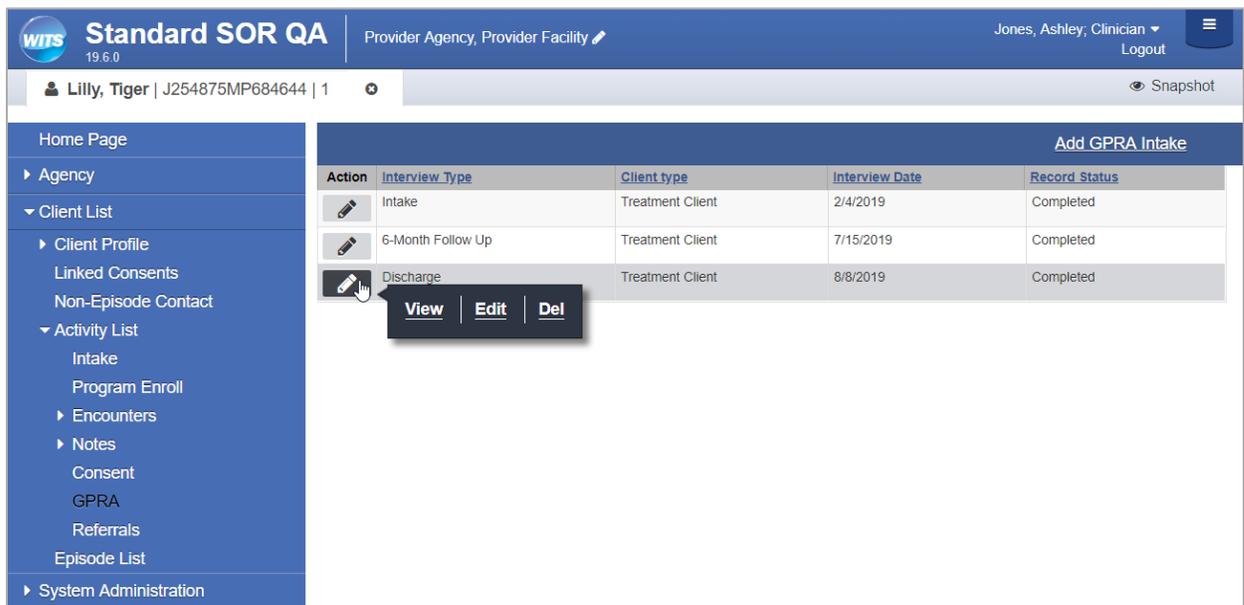
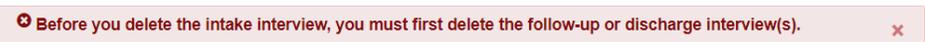


Figure 4-1: GPRA Menu displaying previously entered GPRA Interviews with Actions

Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Table 4-1: Available Actions for GPRA Interviews

Action	Description
View	Opens the interview in read-only mode.

Action	Description
Edit	<p>Opens the interview in edit mode, where certain fields can be updated. A Save button is available on screen, and when clicked, an information message will appear stating that the record has been successfully updated.</p> 
Delete	<p>A confirmation screen will appear, prompting the user to select 'Yes' or 'No' to continue with deleting the record.</p>  <p>If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted.</p> 

Completing Interviews

Action Buttons

GPRA Interviews must be completed in one session and all questions must be answered to save the record. Clicking **Cancel** will cancel adding the GPRA interview. Users progress through the interview by completing the required fields on screen and then clicking the **right-arrow** button to move to the next set of questions. Each field must be completed before moving to the next screen.

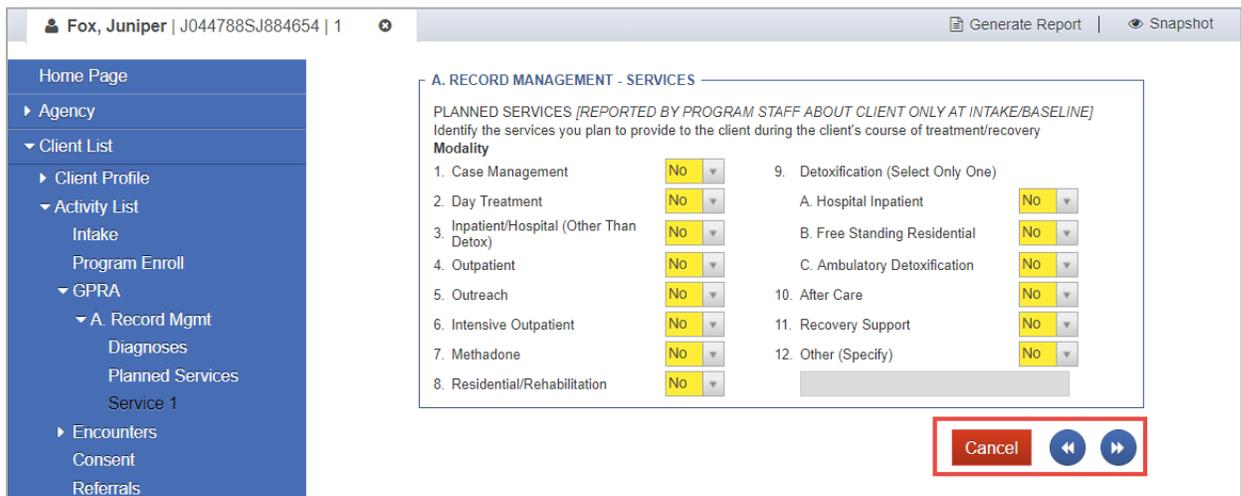


Figure 4-2: GPRA Interview Left and Right-arrow Buttons

Users can choose to go back to a prior screen by clicking the **left-arrow** button, however, answers to the current screen will be lost (a confirmation screen will appear, prompting users to select 'Yes' or 'No' before proceeding).

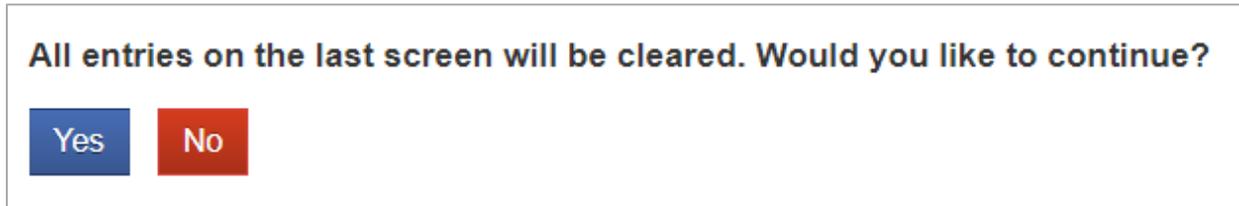


Figure 4-3: GPRA Confirmation message displayed when left-button is clicked

Automation (Skip Logic)

Based on the client’s response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client has not served in the military (answered “No” to Section A Question 5), the system will automatically fill in the other military questions with “Not Applicable”.

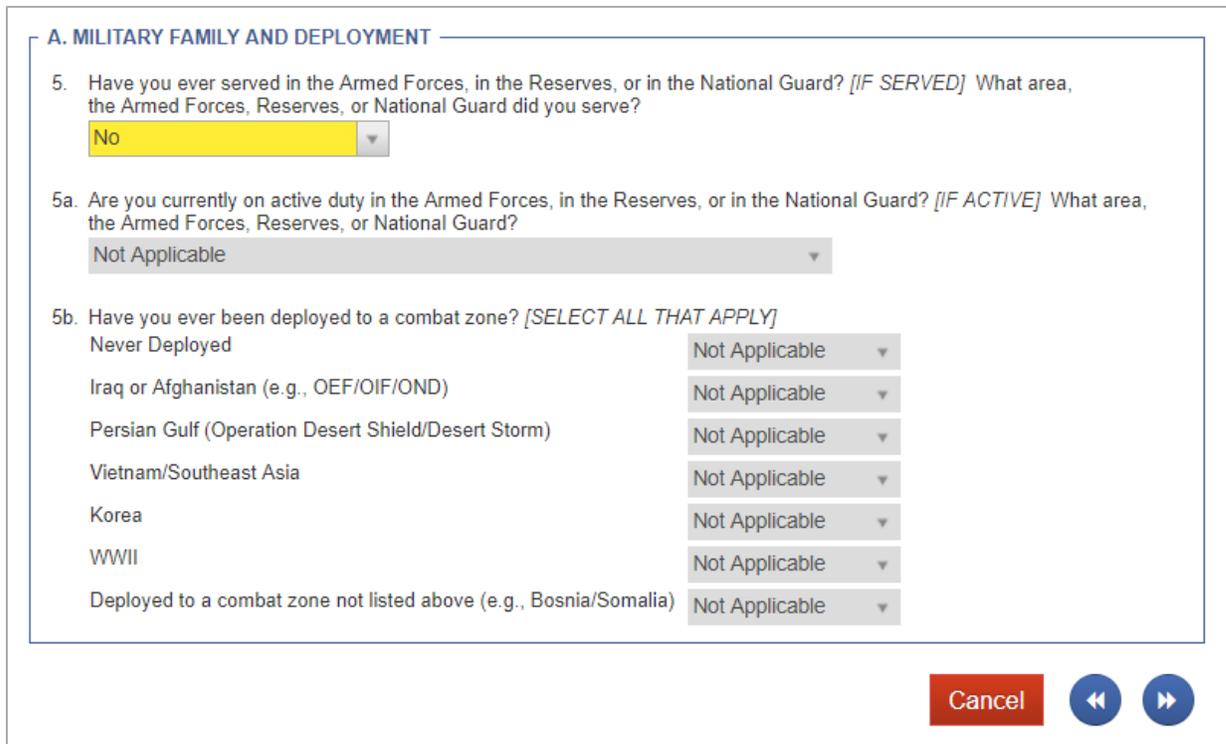


Figure 4-4: GPRA Interview, Automation (skip logic) example

Answers Reviewed

Answers to some questions are also checked with responses given in subsequent sections. For example, the value in field B.1.d (used both alcohol and drugs (on the same day)) should not exceed value in B.1.c (used illegal drugs).

	# of Days	RF/DK
a. Any alcohol	26	
b1. Alcohol to intoxication (5+ drinks in one sitting)	1	
b2. Alcohol to intoxication (4 or fewer drinks in one sitting and felt high)	2	
c. Illegal drugs	4	
d. Both alcohol and drugs (on the same day)	5	

Figure 4-5: Reviewed Answers Example (Section B.), Number of days used alcohol and drugs

You reported that you have used illegal drugs during the past 30 days (B.1.c), then E4 (how many times have you committed a crime) should be no less than B.1.c, since taking illegal drugs is a crime. Do you wish to continue?

	Times	RF/DK
1. In the past 30 days, how many times have you been arrested?	0	
2. In the past 30 days, how many times have you been arrested for drug-related offenses?	Not Applica...	
	Nights	RF/DK
3. In the past 30 days, how many nights have you spent in jail/prison?	0	
	Times	RF/DK
4. In the past 30 days, how many times have you committed a crime?	0	
5. Are you currently awaiting charges, trial, or sentencing?	No	
6. Are you currently on parole or probation?	No	

Figure 4-6: Reviewed Answers Example (Section E.), Used illegal drugs

Entry for Question B.3 should be 'YES' if the Route for any substance is 'Non-IV Injection' or 'IV'.

GPR A Intake Interview



Where: [Client List](#) > [Activity List](#) > [GPR A](#) > [GPR A Intake](#)

Follow the steps below to add a GPR A Intake Interview.

1. To access the GPR A interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

2. On the left menu, click **GPR A**.
3. On the GPR A List screen, click **Add GPR A Intake**.

Figure 4-7: Add GPR A Intake

4. The system will display the first of several GPR A Interview screen. Complete the required fields.

Note: The 'Interview Date' must be greater than or equal to client intake date.

The 'Interview Date' must occur during the active period of the selected Program Enrollment (MM/DD/YYYY -).

The screenshot shows a web application interface for 'Fox, Juniper | J044788SJ884654 | 1'. The left sidebar contains a navigation menu with options like 'Home Page', 'Agency', 'Client List', 'Client Profile', 'Activity List', 'GPRA', 'Encounters', 'Consent', 'Referrals', 'Episode List', 'System Administration', and 'Reports'. The main content area is titled 'A. RECORD MANAGEMENT' and contains the following fields:

- Unique Client Number: J044788SJ884654
- Contract/Grant ID: TI081695
- Client Type: Treatment Client
- Interview Type: Intake
- Did you conduct an interview?:
- Interview Date: mm/dd/yyyy
- Program Enrollment: Facility 1/State Opioid Response (SOR) : 6/3/2019 -
- Created Date:
- Created By:
- Updated Date:
- Updated By:
- Upload Action:
- Upload Status:
- Number of Upload Errors:
- Upload Date:
- Response Date:

At the bottom right of the form, there are 'Cancel' and 'Next' (right arrow) buttons.

Figure 4-8: GPRA Intake, Record Management section

5. Click the **right-arrow** to move to the next GPRA section.
6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

The screenshot shows a summary screen titled 'G. SOCIAL CONNECTEDNESS'. It contains six numbered questions with corresponding response options:

1. In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious or faith-based organization? [In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]
 No Times RF/DK Not Applicable
2. In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?
 No Times RF/DK Not Applicable
3. In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above?
 No Times RF/DK Not Applicable
4. In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?
 Yes
5. To whom do you turn when you are having trouble?
 Friends
 Other (Specify):
6. How satisfied are you with your personal relationships?
 Neither Satisfied nor Dissatisfied

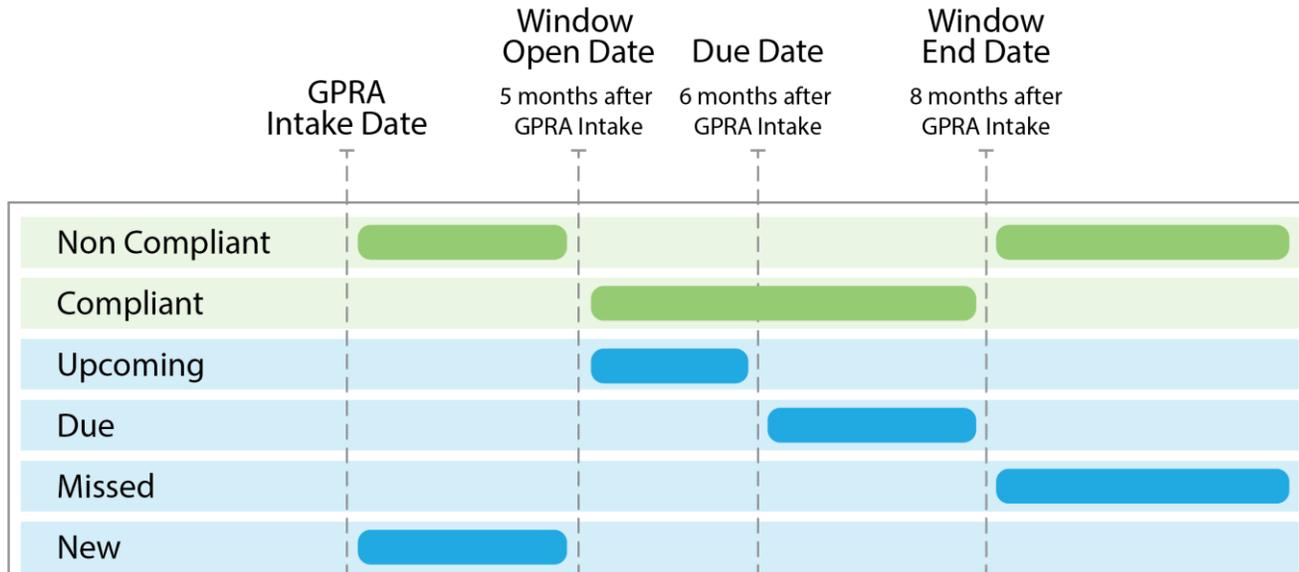
At the bottom of the screen, there are three buttons: 'Previous' (left arrow), 'Cancel', and 'Finish'. A red arrow points to the 'Finish' button.

Figure 4-9: Intake Interview, Summary Screen

GPRC Interview Compliance Details

Grant Requirement

A GPRC Follow-up Interview must be completed with the client 6 months after the GPRC Intake Interview. There is a 3-month window to enter that follow-up interview in WITS and be in compliance with the grant program’s requirement. The compliance window opens 5 months after the GPRC Intake Interview and ends 8 months after the GPRC Intake Interview.



Legend

- █ Follow up GPRC Interview Entered
- █ Follow up GPRC Interview Not Entered

$$\text{Compliance Rate Calculation} = \frac{\text{Number Compliant}}{\text{Number Compliant} + \text{Number Non Compliant} + \text{Number Due} + \text{Number Missed}}$$

Figure 4-10: GPRC Follow-up Due Diagram

Definitions for each follow-up status are included in the following table.

Table 4-2: Follow up Attendance Definitions

Term	Meaning
Compliant	GPRC Follow-up Interviews entered into WITS during the compliance window specified above are considered compliant. The GPRC follow up interview must be conducted (Was the GPRC interview conducted = Yes) and the interview date must be within the window.
Non-Compliant	GPRC Follow-up Interviews entered into WITS outside of the compliance window specified above are considered non-compliant. This count also includes GPRC Follow-up Interviews that are entered in the system but were not conducted (with no interview date, Was the GPRC interview conducted = No).
Upcoming	Clients with no follow-up interview who have a GPRC intake Interview dated between 5 and 6 months ago (for 6-month follow up) are part of the Upcoming count.

Term	Meaning
Due	Corresponds to the number of clients who have reached the due date (6 months) and do not yet have a GPRA Follow-up Interview record in WITS. This count does not consider the clients who have a corresponding GPRA Discharge Interview with a termination of "Death, Unknown" and "Death, Cause known". This would cover a scenario where a client died before the follow-up became due.
Missed	The clients who do not have a GPRA Follow-up Interview entered into WITS after the end of the window are a part of the Missed count.
New	The Clients who have a GPRA intake Interview, no GPRA Follow-up Interview, and who have not entered in a follow up window yet, are a part of the New count.

GPRF Follow-up Due Summary Screen

 **Where:** Agency > GPRF Follow-up Due Summary

The **GPRF Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields are listed in the table below.

The search results will display a distinct count of GPRF interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 33 above.

Table 4-3: GPRF Follow-up Due Summary Screen Search Filters

Field	Description
Agency Type	In the Agency Type search field, the option "Intake" represents the agency where the GPRF Intake Interview was conducted. The option, "Follow-up" represents any agency where the GPRF follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has View GPRF Follow Up Compliance and All Agency Access roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has View GPRF Follow Up Compliance and All Agency Access roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.

The screenshot shows the 'GPRF Follow-up Interview Due Summary Search' interface. It features a search form with the following fields: Agency Type (set to 'Intake'), Agency (set to 'ALL'), and Facility (empty). The Grant is set to 'SOR'. There are 'Clear' and 'Go' buttons. Below the search form is a table titled 'GPRF Follow-up Interview Due Summary List (Export)'. The table has three columns: 'Actions' (with edit icons), 'Status', and 'Distinct GPRF Count'. The data in the table is as follows:

Actions	Status	Distinct GPRF Count
	Compliant	2
	Due	1
	Missed	7
	New	7
	Non Compliant	5
	Upcoming	1

At the bottom of the screen, the Compliance Rate is shown as 13% with an information icon.

Figure 4-11: GPRF Follow-up Due Summary screen

Detailed information for each interview status can be seen by hovering over the pencil icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRa Follow-up Due Detail screen, displaying the associated client records for the selected interview status and the current search criteria. The GPRa Follow-up Due Detail screen is covered in the next section.

GPRa Follow-up Interview Due Summary List (Export)		
Actions	Status	Distinct GPRa Count
	Compliant	2
	Due	1
	Missed	7
	New	7
	Non Compliant	5
	Upcoming	1

Details ←

Compliance Rate 13 % ⓘ

Figure 4-12: GPRa Follow-up Interview Status List, Details link

GPRF Follow-up Due Detail Screen



Where: Agency > GPRF Follow-up Due Detail

The **GPRF Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRF interview status. Staff members can use the available search fields and click **Go** to view the results.

Table 4-4: GPRF Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the Agency Type search field, the option "Intake" represents the agency where the GPRF Intake Interview was conducted. The option, "Follow-up" represents any agency where the GPRF follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has View GPRF Follow Up Compliance and All Agency Access roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has View GPRF Follow Up Compliance and All Agency Access roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The Status search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see <i>Table 4-2: Follow up Attendance Definitions</i> on page 33 above.

Figure 4-13: GPRF Follow-up Due Detail screen

If the staff member was redirected to this screen by clicking the **"Details"** link on the GPRF Follow-up Due Summary screen, the Agency Type, Agency, Facility and Grant, search fields and Status will be prepopulated with the options entered on the Summary screen. The following informational message will also be displayed, *"The records on this list may not match the total from the summary because you may not have access to some clients."*

Note: Since the GPRF Follow-up Due Detail screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

i The records on this list may not match the total from the summary because you may not have access to some clients. x

The screenshot shows the WITS Standard SOR QA interface. The top navigation bar includes the WITS logo, 'Standard SOR QA 19.9.1', the user 'Jones, Ashley', and a 'Logout' button. A sidebar on the left contains a menu with options like 'Home Page', 'Agency List', 'GPRF Discharge Due', 'GPRF Follow-up Due Summary', 'GPRF Follow-up Due Detail', 'Overdose Reversal Kits', 'Facility List', 'Staff Members', 'Alerts Configuration', 'Group List', 'Client List', 'System Administration', 'Reports', and 'Support Ticket'. The main content area is titled 'GPRF Follow-up Interview Due Detail Search' and contains several search filters: Agency Type (Intake), Agency (ALL), Facility, GPRF Intake Date, Due Date, Status (Upcoming), Grant (SOR), First Name, Last Name, and Unique Client Number. Below the search filters is a table titled 'GPRF Follow-up Interview Due Detail List (Export)'. The table has columns for Actions, Unique Client Number, Client Name, Agency Name, Facility Name, Status, GPRF Intake Date, Due Date, Followup Open Date, and Followup Close Date. A single row is visible with the following data: Unique Client Number: J553779EN601544, Client Name: jain, Rekha, Agency Name: Newest SOR Agency, Facility Name: facility 1, Status: Upcoming, GPRF Intake Date: 4/18/2019, Due Date: 10/18/2019, Followup Open Date: 9/18/2019, Followup Close Date: 12/18/2019. A red arrow points to the 'View' link in the Actions column of this row.

Figure 4-14: GPRF Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the “View” link will redirect to the client’s GPRF list screen if the staff member is currently in the same context agency as the client. If the staff members’ context agency is different than the client, clicking the “View” link will display the following error message, “This client does not exist in the context agency. Please change your context agency to view the client.”

This screenshot is similar to Figure 4-14 but highlights the 'View' link in the Actions column of the table row. A red arrow points to the 'View' link, which is a button with a pencil icon and the text 'View'.

Figure 4-15: GPRF Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you’re in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

“This client does not exist in the context agency. Please change your context agency to view the client.”

This client does not exist in the context agency. Please change your context agency to view the client.

GPRF Follow-up Interview



Where: [Client List](#) > [Activity List](#) > [GPRF](#) > [GPRF Follow-up](#)

GPRF Follow-up Interviews should be added 5 to 8 months after a client’s GPRF Intake Interview Date. Follow-up GPRF Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed. If the follow-up interview has **not** been conducted, **section I** must be completed.

- To access the GPRF interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

The screenshot shows the 'Client Search' interface. The search form includes fields for Agency (Provider Agency), Facility, First Name, Last Name, SSN, and DOB. Below the search form is a table titled 'Client List (Export)' with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. A red arrow points to the pencil icon in the Actions column for the client 'Lilly, Tiger'. A tooltip menu is open over the pencil icon, showing options for Profile, Activity List, and Linked Consents.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	J584688SJ884664	ox, Juniper	1/24/2002	242-22-4444	Female
	J254875MP684644	Lilly, Tiger	8/1/2004	777-33-4321	Female

- On the left menu, click **GPRF**.
- On the GPRF List screen click **Add GPRF Follow-up**.

The screenshot shows the 'GPRF List' interface. The table has columns for Action, Interview Type, Client type, Interview Date, and Record Status. A red arrow points to the 'Add GPRF Followup' link in the top right corner of the table.

Action	Interview Type	Client type	Interview Date	Record Status
	Intake	Treatment Client	2/4/2019	Completed

Figure 4-16: GPRF list, Add GPRF Follow-up link

- The system will display a confirmation screen stating, "You are about to enter a 6-month follow-up record for this client. Would you like to continue?" Select **Yes** to start the follow-up interview.



Figure 4-17: Follow-up interview confirmation screen

Note: The system will display a warning message if the Follow-up Interview Date is not within 5 to 8 months after the GPRA Intake Interview Date. This message will also be displayed on the GPRA list screen.



- When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the right-arrow button will display Section I. Follow-up Status.

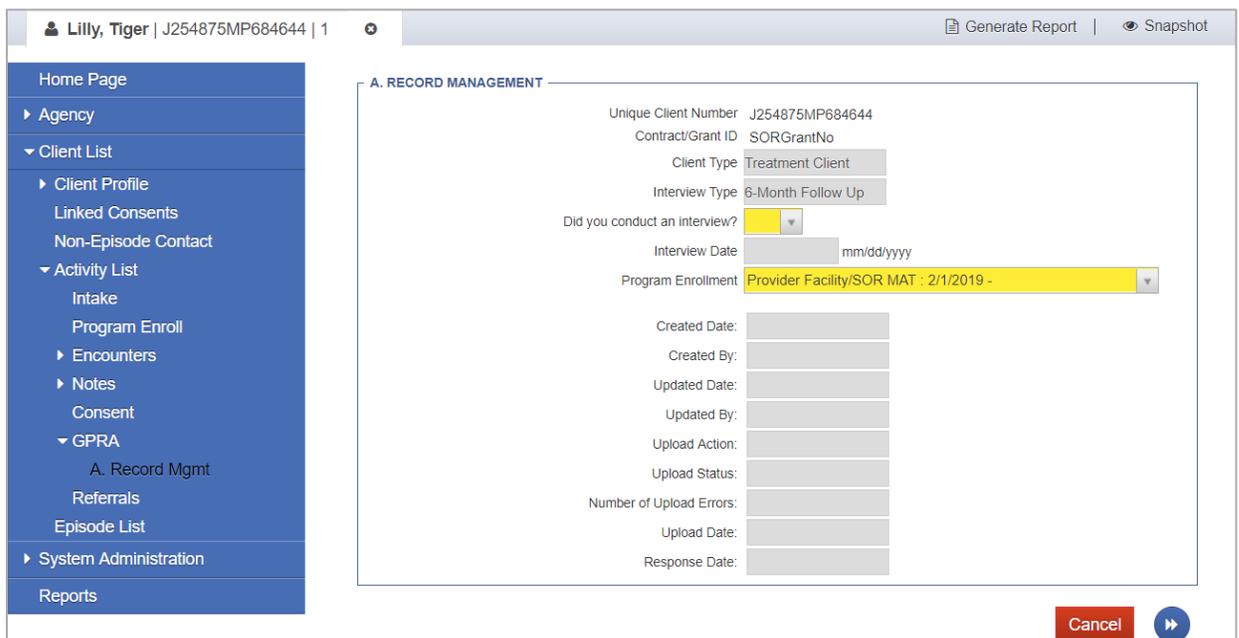


Figure 4-18: GPRA Follow-up, Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s) within the grant episode, and the user answers **“Yes”** to questions 1a or 2a, then medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to “Yes” for each medication listed on the encounter(s), and “No” to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client’s grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug on the GPRA discharge and Follow ups will be set. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, then it counts 1 day per medication.

A. RECORD MANAGEMENT - BEHAVIORAL HEALTH DIAGNOSES

Please select a behavioral health diagnosis from the Classification of Diseases and Health-Related Problems (ICD-10-CM)

1. In the past 30 days, was the client diagnosed with an opioid use disorder? Yes

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this opioid use disorder? (Select all that apply)

	Received	# of Days
Methadone	Yes	1
Buprenorphine	Yes	1
Naltrexone	No	
Extended-release Naltrexone	Yes	1

2. In the past 30 days, was the client diagnosed with an alcohol use disorder? Yes

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this alcohol use disorder? (Select all that apply)

	Received	# of Days
Naltrexone	No	
Extended-release Naltrexone	Yes	1
Disulfiram	No	
Acamprosate	No	

Figure 4-19: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

Note: For question I.1., make sure to select the correct follow-up status for the client from the drop-down list, especially when selecting if the interview was completed **within** specified window, or **outside** specified window.

I. FOLLOW-UP STATUS

1. What is the follow-up status of the client?
If "Unable to locate, other", (Specify)

2. Is the client still receiving services from your program?

Deceased at time of due date
Completed interview within specified window
Completed interview outside specified window
Located, but refused, unspecified
Located, but unable to gain institutional access
Located, but otherwise unable to gain access
Located, but withdrawn from project
Unable to locate, moved
Unable to locate, other

7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

G. SOCIAL CONNECTEDNESS

1. In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious or faith-based organization? *[In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]*

Yes Times RF/DK

2. In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?

No Not Applicable

3. In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above?

No Not Applicable

4. In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?

Yes

5. To whom do you turn when you are having trouble?

Family member

Other (Specify):

6. How satisfied are you with your personal relationships?

Neither Satisfied nor Dissatisfied

I. FOLLOW-UP STATUS

1. What is the follow-up status of the client? Completed interview within specified window

If "Unable to locate, other", (Specify)

2. Is the client still receiving services from your program? Yes

Cancel Finish

8. If the GPRa Follow up interview was conducted within the 5 to 8 months window, and if no GPRa Discharge exists for this client’s grant episode, then the system will display a confirmation screen asking if you would like to create a GPRa Discharge interview with the same information as the GPRa Follow up interview:

Do you want to generate a completed discharge GPRA interview based on this follow-up GPRA interview?

Select **Yes** and the GPRA Discharge will automatically be created. It is recommended that you review the newly created GPRA Discharge interview and make any updates as necessary. For example, **section J – Discharge Status** may need questions 3. and 4. updated from “No” to “Yes”, if it applies.

J. DISCHARGE STATUS

1. On what date was the client discharged? mm/dd/yyyy

2. What is the client's discharge status?

If the client was terminated, what was the reason for termination?

Other (Specify)

3. Did the program test this client for HIV?

4. Did the program refer this client for testing?

Figure 4-20: Discharge Status

GPRD Discharge Due Screen



Where: Agency > GPRD Discharge Due

The **GPRD Discharge Due** screen displays at the Agency level, clients with a GPRD Intake interview date 30 days ago and the client has no encounter, or their most recent encounter is 30 days ago. Users can select from the available search fields and click **Go** to view the search results. In the **Actions** column, clicking the **View Client** link will redirect to the client's GPRD list screen if the staff member is currently in the same context agency as the client.

Table 4-5: GPRD Discharge Due Screen Search Filters

Field	Description
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has All Agency Access roles, then this field will display all the agencies.
Grant	This field will be prepopulated with the SOR grant.

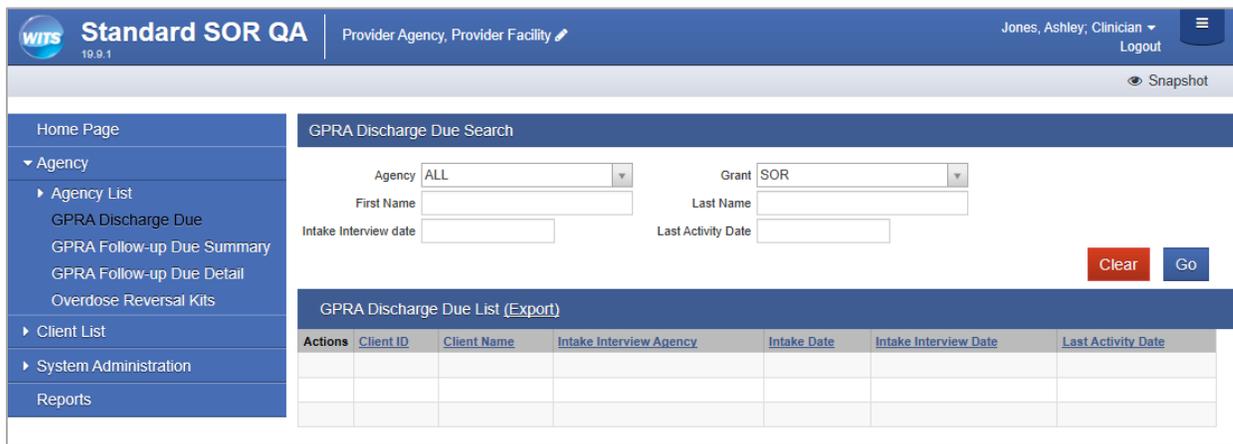


Figure 4-21: GPRD Discharge Due Screen

Note: Since the GPRD Discharge Due screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

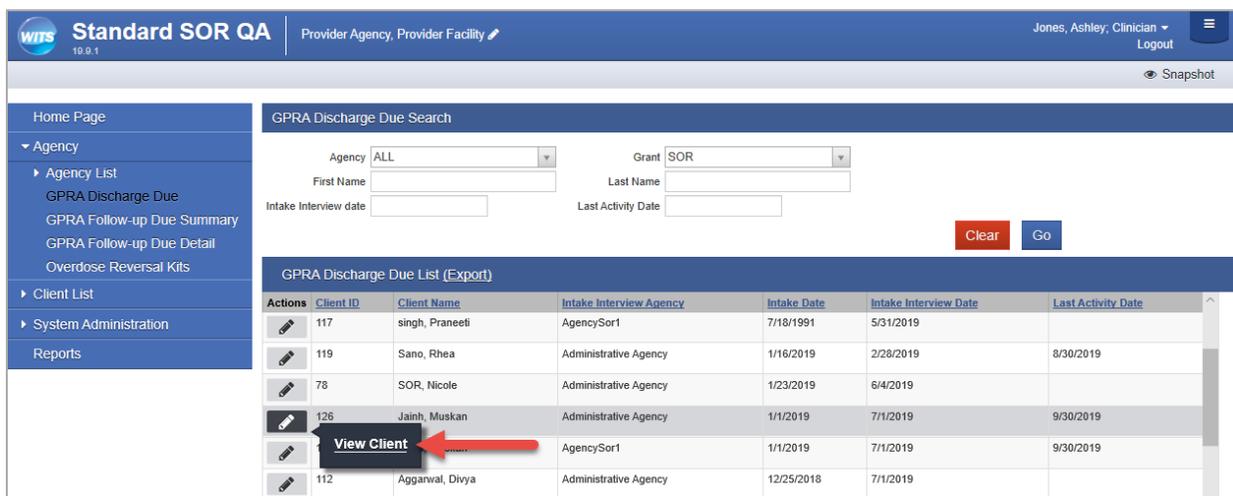


Figure 4-22: GPRD Discharge Due screen, View Client link

GPRa Discharge Interview



Where: [Client List](#) > [Activity List](#) > [GPRa](#) > [GPRa Discharge](#)

To add a discharge record, follow the steps below.

Note: If a Discharge interview has been conducted, **Sections B through G, J and K** must be completed. If the Discharge interview **has not** been conducted, **Sections J and K** must be completed.

- To access the GPRa interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	J584688SJ884664	Box, Juniper	1/24/2002	242-22-4444	Female
	J254875MP684644	Lilly, Tiger	8/1/2004	777-33-4321	Female

- On the left menu, click **GPRa**.
- On the GPRa List screen, click **Add GPRa Discharge**.

Action	Interview Type	Client Type	Interview Date	Record Status
	Intake	Treatment Client	2/4/2019	Completed
	6-Month Follow Up	Treatment Client	7/15/2019	Completed

Figure 4-23: GPRa List screen, Add GPRa Discharge link

- The system will display the following message, "You are about to enter a discharge record for this client. Would you like to continue?" Select **Yes** to start the discharge interview.

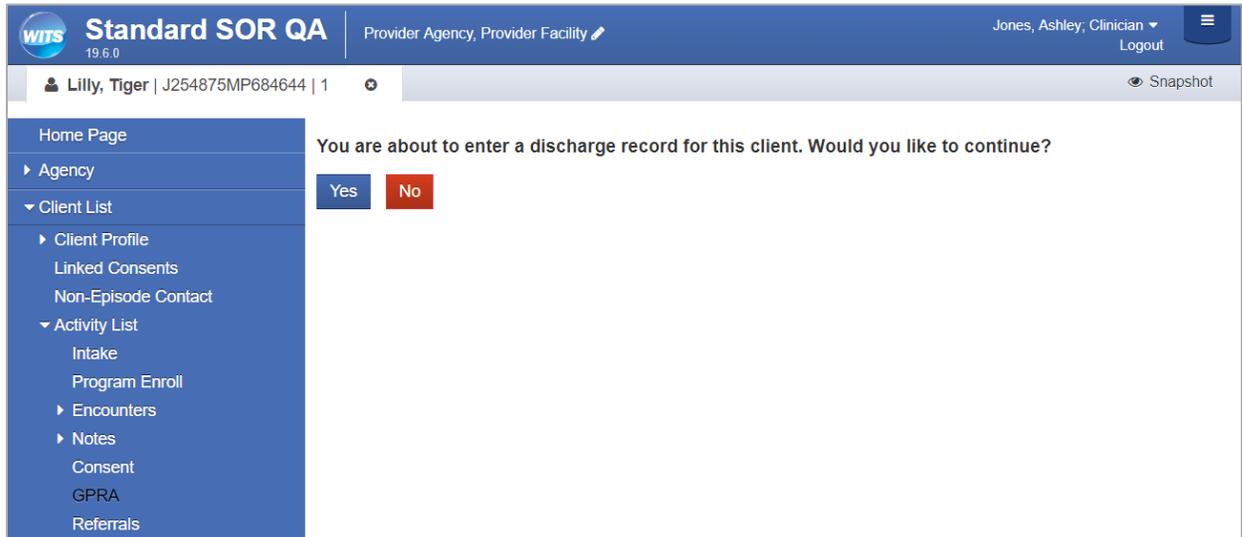


Figure 4-24: Discharge interview confirmation screen

- When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the right-arrow button will display Section J. Discharge Status.

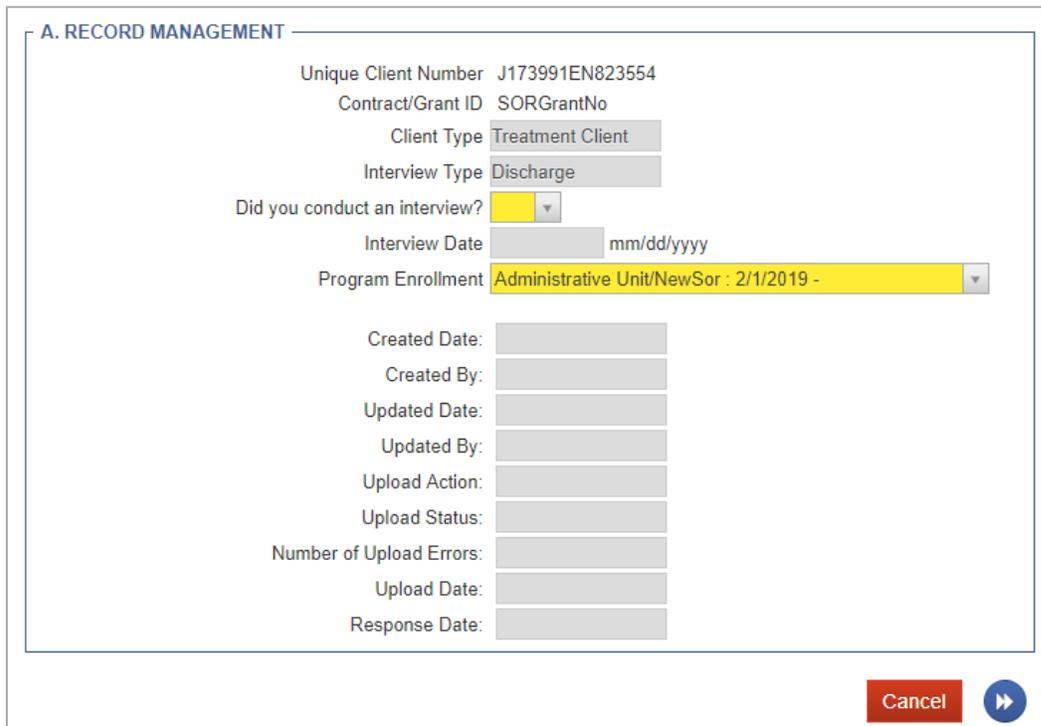


Figure 4-25: GPR Discharge Interview; Section A. Record Management

- In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s), and the user answers “**Yes**” to questions 1a or 2a, medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to “Yes” for each medication listed on the encounter(s), and “No” to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client’s grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug is set on the GPRA discharge and Follow ups. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, 1 day per medication is counted.

A. RECORD MANAGEMENT - BEHAVIORAL HEALTH DIAGNOSES

Please select the behavioral health diagnosis for this client. Classification of Diseases, Mental and Behavioral (ICD-10-CM)

1. In the past 30 days, was the client diagnosed with an opioid use disorder? Yes

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this opioid use disorder? (Select all that apply)

	Received	# of Days
Methadone	Yes	1
Buprenorphine	Yes	1
Naltrexone	No	
Extended-release Naltrexone	Yes	1

2. In the past 30 days, was the client diagnosed with an alcohol use disorder? Yes

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this alcohol use disorder? (Select all that apply)

	Received	# of Days
Naltrexone	No	
Extended-release Naltrexone	Yes	1
Disulfiram	No	
Acamprosate	No	

Cancel
⏪
⏩

Figure 4-26: GPRA Discharge Interview, Section A, questions 1a and 2a, prepopulated values

- Complete the required fields and click the **right-arrow** button to progress to the next screen.

WITS Standard SOR QA 19.6.0 | Provider Agency, Provider Facility | Jones, Ashley, Clinician | Logout

Lilly, Tiger | J254875MP684644 | 1 | Generate Report | Snapshot

J. DISCHARGE STATUS

- On what date was the client discharged?
- What is the client's discharge status?
- If the client was terminated, what was the reason for termination?

 Other (Specify)
- Did the program test this client for HIV?
- Did the program refer this client for testing?

Cancel [Navigation Buttons]

Figure 4-27: Section J. Discharge Status

8. **Section K – Services Received** will be prepopulated based on the encounter(s) recorded for the client within the grant episode (encounters may have been entered in other agencies than yours). You may edit this section as needed.

K. SERVICES RECEIVED

Identify the number of DAYS of services provided to the client during the client's course of treatment/recovery. [ENTER ZERO IF NO SERVICES PROVIDED.]

Modality	Days	Modality	Days
1. Case Management	0	9. Detoxification (Select Only One)	
2. Day Treatment	0	A. Hospital Inpatient	0
3. Inpatient/Hospital (Other Than Detox)	0	B. Free Standing Residential	0
4. Outpatient	25	C. Ambulatory Detoxification	0
5. Outreach	0	10. After Care	0
6. Intensive Outpatient	0	11. Recovery Support	5
7. Methadone	0	12. Other (Specify)	0
8. Residential/Rehabilitation	0		

Cancel Save [Navigation Buttons]

Figure 4-28: Section K. Services Received; Number of Days of Services

K. SERVICES RECEIVED

Identify the number of SESSIONS provided to the client during the client's course of treatment/recovery.
Treatment Services
[ENTER ZERO IF NO SERVICES PROVIDED. YOU SHOULD HAVE AT LEAST ONE SESSION OF TREATMENT PROVIDED.]

	Sessions		Sessions
1. Screening	0	8. Group Counseling	1
2. Brief Intervention	0	9. Family/Marriage Counseling	0
3. Brief Treatment	0	10. Co-Occurring Treatment/ Recovery Services	0
4. Referral to Treatment	0	11. Pharmacological Interventions	10
5. Assessment	0	12. HIV/AIDS Counseling	0
6. Treatment/Recovery Planning	0	13. Other Clinical Services (Specify)	0
7. Individual Counseling	5		

Cancel Save ⏪ ⏩

Figure 4-29: Section K. Services Received; Number of Sessions Provided

Please contact your system administrator if you believe encounters exist for this client but the Services Received section is not populated with the number of days and sessions; the mapping of the modalities and services may be incomplete.

- 9. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

K. SERVICES RECEIVED

Education Services

	Sessions		Sessions
1. Substance Abuse Education	0	3. Other Education Services (Specify)	0
2. HIV/AIDS Education	0		

Peer-To-Peer Recovery Support Services

	Sessions		Sessions
1. Peer Coaching or Mentoring	0	4. Information and Referral	0
2. Housing Support	0	5. Other Peer-to-Peer Recovery Support Services (Specify)	0
Alcohol-and Drug-Free			
3. Social Activities	0		

⏪ Cancel Finish

Part 5: Consent and Referrals

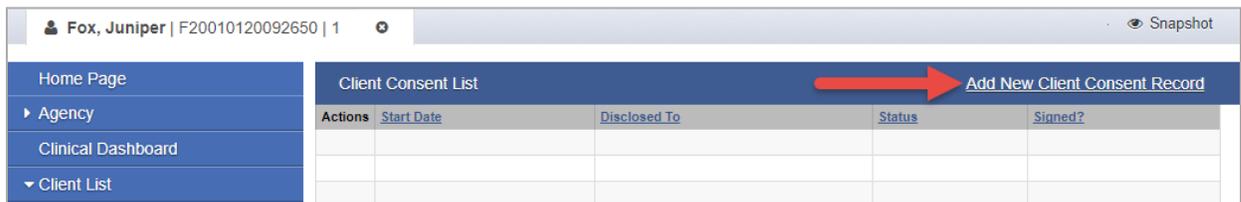
Create Client Consent Record



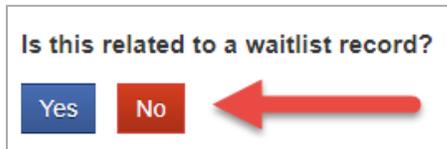
Where: *Client List* > *Activity List* > *Consent*

The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic health record.

1. On the left menu, click **Client List** and search for a client.
2. Locate the client, hover over the Actions column, and then click **Activity List**.
3. On the left menu, click **Consent**.
4. Click the **Add New Client Consent Record** link.



5. Select **No**.



6. On the Client Disclosure Agreement screen, complete the following fields.

Table 5-1: Client Disclosure Agreement fields

Field	Description
Entities with Disclosure Agreements	Select from the drop-down list. This field will display a list of agencies that have previously created a Disclosure template. This will prepopulate fields in the "Client Information To Be Consented" section, which can then be modified if needed.
System Agency	Select "Yes" if the agency uses WITS.
Disclosed to Agency	Select the agency that will be receiving the client's information.
Facility	Select the facility within the selected Agency that will be receiving the client's information. Select All Facilities, or an individual facility.
Purpose for Disclosure	Type the reason for creating the Consent record.
Earliest date of services to be consented	Select the date.
Has the client signed the paper agreement form	Select "No" to save the screen and have the client sign the paper form (see below), after client has signed, select "Yes".

Field	Description
Date client signed consent	This field will become editable when "Yes" is selected in the previous field.

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: poppins, mary
 Unique Client Number: P15206017665430
 Disclosed From Agency: Administrative Agency

Entities with Disclosure Agreements

System Agency Yes

Disclosed To Agency A & O RECOVERY SERVICES INC Facility All Facilities

Disclosed To Entity (Non System Agency)

Purpose for disclosure Client's level of care has changed and needs to receive

Earliest date of services to be consented 6/1/2017

Has the client signed the paper agreement form No Date client signed consent

Client Information To Be Consented

Expiration Type Discharge(UD) + Days

*Expiration type is required for disclosure activities.

Client Information Options

- Admission
- ASAM
- ATR Eligibility Screen
- Behavioral Health Assessment
- CAGE-AID Screening
- CONTINUUM Triage™ Assessment
- CONTINUUM™
- DENS ASI Assessment
- DENS ASI Lite
- Diagnosis List

Disclosure Selection

- Client Information (Profile) (UD, +3)
- Client Screening (UD, +30)
- Consent (UD, +30)
- Intake Transaction (UD, +30)
- TAP Assessment (UD, +30)

Comments Other Disclosures

Cancel
Save
Finish

Figure 5-1: Client Disclosure Agreement screen

- If additional consent information needs to be added or removed from the client’s disclosure agreement, update the options from the “Client Information To Be Consented” section. Your agency administrator may have set up templates for the disclosure agreement.

Table 5-2: Client Information To Be Consented fields

Field	Description
Expiration Type and + Days	Select either “Discharge (UD)” or “Date Signed (DS)”, then when the yellow field appears, enter the number of days the consent will expire.
Client Information Options/Disclosure Selection	Select options from the box and use the mover buttons to add or remove the desired consent options.

- When all required fields are complete, click **Save**.

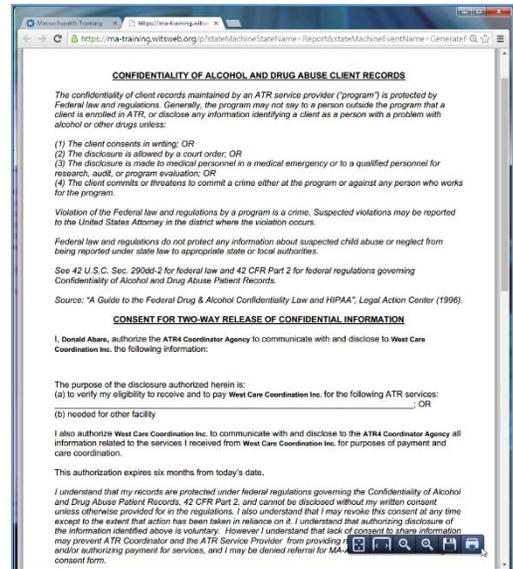
Print the Client Consent Form

- After saving the Client Disclosure Agreement screen, click the **Generate Report** link to print the Client Consent Form to get the client’s signature on the paper copy. The printed consent form includes items from the Client Information Options box along with the Consent Expires information.



Figure 5-2: Client Disclosure Agreement screen, Generate Report

- Once the client has signed the paper form, update these fields:
 - Has client signed the paper agreement form:** select “Yes”
 - Date client signed consent:** defaults to current date
- Click **Save** and stay on this screen (notice the fields are now grayed out).
- After saving the client consent, a link to add a Client Referral for this consent will be available. This will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.
- Click the link, **Create Referral Using this Disclosure Agreement**, and continue to the next section.



Printable Consent Form



Figure 5-3: Create Referral Using this Disclosure Agreement link

Referrals

Create a Client Referral



Where: [Client List](#) > [Activity List](#) > [Referrals](#)

Continuing from previous section...

Once the Client Consent is complete, create the Client Referral Record. A referral is used when the receiving agency (another WITS agency) will be providing services for the client. Referrals may also be done from one facility to another facility within the same agency.

1. After clicking the **Create Referral Using this Disclosure Agreement** link, the Referral screen will open.

Figure 5-4: Referral screen

2. On the Client Referral screen, complete the required fields in the **Referred By** section, including:

Table 5-3: Referred By fields

Field	Description
Program	Select the Program It should be a referral from a program with the SOR grant to another program with the SOR grant
Reason	In the drop-down field, select the reason why this client is being referred.
Is Consent Verification Required?	Select Yes.
Is Consent Verified?	Select Yes.
Continue Episode of Care?	Select No.
Referral Status	State of the referral (this should be "Referral Created/Pending").

Field	Description
Created Date	Date client is referred.

- Next, in the **Referred To** section, complete all the required fields, including:

Table 5-4: Referred To fields

Field	Description
Signed Consents	Select the consent from list of available consents.
Agency	This field will auto populate based on the "Consent" selected.
Facility	The facility the client is being referred to.
Program	The program the client is being referred to. It should be an SOR program.

- When complete, click **Save**.

Viewing Referrals

Referrals In



Where: Agency > Agency List > Referrals > Referrals In

Whenever clients are referred in to your Agency from another agency, a message will appear on the Home Page as shown in Figure 5-5: Home Page with "referred in" notification. Clients who have been referred in have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.

Role Needed:

- Referrals (Full Access)

Note: Only users with the Referrals (Full Access) role will see Referrals left menu link.



Figure 5-5: Home Page with "referred in" notification

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select "**Referral Created/Pending**" and move this option to the **Search Criteria** box by clicking the mover button (>) as shown in figure below.
3. After selecting the search criteria, click **Go** to view the search results list.

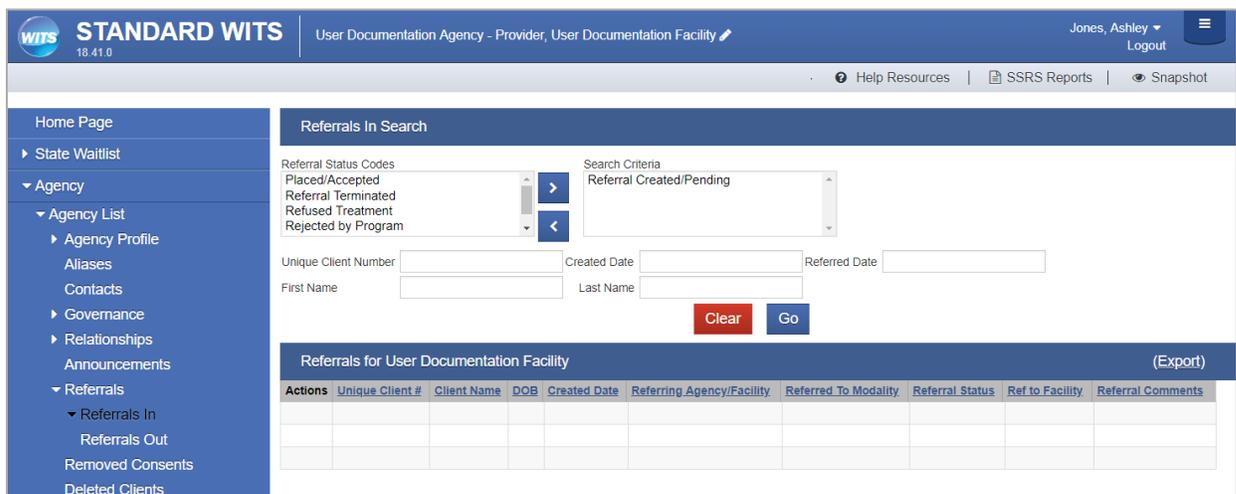


Figure 5-6: Referrals In Search screen

- Notice that any referred clients will appear in the list portion of the screen. To view a client's referral information, hover over the Actions column, and then click **Review**.

Referrals for User Documentation Facility									(Export)
Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
	F919895OH605120	Houlihan, Margaret	9/21/1958	6/19/2017	Administrative Agency/Administrative Unit	Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	User Documentation Facility	
	10	Barb, Jon	1/14/1968	6/19/2017	Administrative Agency/Administrative Unit	Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	User Documentation Facility	

Figure 5-7: Referrals Search Results, Review link

- To accept the client referral, click on the **Referral Status** field and select "**Placed/Accepted**" from the drop-down list. The client must be accepted into your agency before viewing the client's record, or working on the case.

Figure 5-8: Referral screen, Referral Status field

- (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop down box to provide any additional information about the appointment.
- Click **Finish** to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.

(Optional) Additional **Referral Status** reasons to select:

- Referred/Terminated:** When the referral has been deleted by the referring agency.
- Refused Treatment:** Select if the client does not want to be treated.
- Rejected by Program:** If the client is not eligible or is not acting in compliance.
- Wait List:** If the client is waiting for a slot to open in the program.

Note: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out



Where: Agency > Agency List > Referrals > Referrals Out

The Referrals Out screen is used to check the status of referrals made from your agency to other agencies.

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals Out**.
2. On the **Referrals Out Search** screen, in the **Referral Status Codes** field, select the desired codes and move them to the **Search Criteria** box by clicking the mover button (>).
3. After selecting the search criteria, click **Go** to view the search results list.

Figure 5-9: Referrals Out screen

Removed Consents



Where: Agency > Agency List > Removed Consents

This screen displays clients with consents that have been removed. This is typically done if a client is no longer in treatment at your agency. To help easily manage the number of clients with consents from outside agencies on the Client List screen, users with the Clinical Supervisor role can “remove” consented clients from the list.

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender

Figure 5-10: Removed Consents screen

Part 6: Encounters

Create Encounter Notes



Where: *Client List > Activity List > Encounters*

1. On the left menu, click **Client List** and search for a client.
2. Hover over the Actions column and click **Activity List**.
3. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
4. To view previous encounters, complete the search fields and click **Go**.
5. To create a new encounter, click **Add Encounter**.

Standard SOR QA 19.0.0 Provider Agency, Provider Facility Jones, Ashley, Clinician Logout

Fox, Juniper | J584688SJ884664 | 1 Generate Report Snapshot

No results match your search criteria.

Encounter Search

Start Date: 1/24/2018 End Date: 1/24/2019

Rendering Staff: Service: Encounter Status: Program: Allow Disclosure of Note: Clear Go

Encounter List (Export) Add Encounter

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status

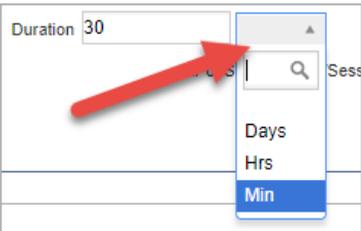
Figure 6-2: Encounter screen, Add Encounter

Figure 6-1: Encounter Profile screen with EBP field

- Complete the fields on the Encounter Profile screen. See table below for information on each field.

Table 6-1: Encounter Profile fields

Field	Description
Note Type	Select from the drop-down field.
ENC ID	Read-only field. When the encounter is saved, this field will display its unique ID number.
Created Date	Read-only field. This field will display the date and time when the encounter is saved.
Program Name	This field will pre-populate with the client’s current program enrollment name and program enrollment start date. 
Service	Select a service from the drop-down list.
Billable	This field may be pre-populated with Yes or No.
Service Location	Select an option from the drop-down list. This field may be pre-populated if this information was added to the facility profile.
Start Date	Enter the date when this service was rendered. Note: The start date for this encounter must occur within the same program enrollment period. Encounter date cannot be before the intake date.
Start Time	Enter the time when this service was rendered. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
End Date	Enter the date when this service ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.

Field	Description
	<p>Note: The end date for this encounter must occur within the same program enrollment period.</p>
End Time	<p>Enter the time when this encounter ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.</p>
Duration	<p>In the Duration field, type an integer to record time spent for this encounter. In the Duration drop-down field, select the unit of time.</p> <p>Note: The duration field will only accept whole numbers. Decimals (e.g., 0.5) are not accepted.</p>  <p>These fields may be optional or required depending on the selected service. Some services may be set up to require this information.</p>
# of Service Units/Sessions	<p>Type an integer representing the number of units or sessions spent for this service. Your administrator may have established policy guidelines regarding how services are recorded.</p>
Evidence-Based Practices	
Which Evidence-Based Practices were used?	<p>Select options from the box and use the mover buttons to add or remove the Evidence-Based Practices options. (Optional)</p>
<p>Which Evidence-Based Practices were used?</p> 	
Diagnoses for this Service	
Primary	<p>(Optional) This field will pre-populate with the client's primary diagnosis based on the encounter start date.</p>
Secondary	<p>(Optional) This field will pre-populate with the client's secondary diagnosis based on the encounter start date.</p>
Tertiary	<p>(Optional) This field will pre-populate with the client's tertiary diagnosis based on the encounter start date.</p>
Rendering Staff	<p>This field will pre-populate to the user logged in. To change the rendering staff, select the correct staff member from the drop-down list.</p>
Supervising Staff	<p>(Optional) In the drop-down list, select the Supervisor for the Rendering Staff member, if applicable.</p> <p>Note: Declaring staff members as "supervisors" is a feature controlled through the staff member's profile by adding relationships.</p>

- 7. Click **Save**, and then click the **right-arrow**.

Encounter Notes section of the Encounter allows the staff to enter notes related to the time spent with the client. If the client has an Active Treatment Plan, the staff can add Goals, Objectives, and Interventions to the encounter.

The screenshot displays the 'Encounter Notes' interface. At the top, there is a 'Goal Progress' dropdown menu. Below this are three sections for adding data:

- Add Goals:** A table with columns 'Goal #', 'Goal', and 'Description'. An 'Add Goals' link is in the top right.
- Add Objectives:** A table with columns 'Obj #', 'Objective', and 'Description'. An 'Add Objectives' link is in the top right.
- Add Interventions:** A table with columns '#', 'Intervention', and 'Status'. An 'Add Interventions' link is in the top right.

Below these sections are two text input areas:

- Signed Notes:** A large text area with a grey background. Below it are buttons for 'Allow Disclosure' (set to 'No'), 'Cancel', 'Save', 'Finish', and navigation arrows.
- Unsigned Notes:** A large text area.

At the bottom right of the interface are 'Add Note' and 'Sign Note' buttons.

Figure 6-4: Encounter Note, Add Goals, Objectives, and Interventions

Part 7: Overdose Reversal Kit



Where: *Agency > Overdose Reversal Kit*

Required Role(s):

- Overdose Reversal Kits Management (Full Access)
- Overdose Reversal Kits Management (Read Only)

As part of the SOR reporting requirements, grantees must provide on a quarterly basis the number of naloxone kits purchased and distributed with the SOR funds. This new module has been created to track three (3) types of events:

Event Types:

- Naloxone Purchase
- Naloxone Distribution
- Naloxone Administration



Note: Please refer to the WITS Basics User guide, **Part 1: System Icons** for information on the screen conventions for the Overdose Reversal screens.

Add New Overdose Reversal Kit Event

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.

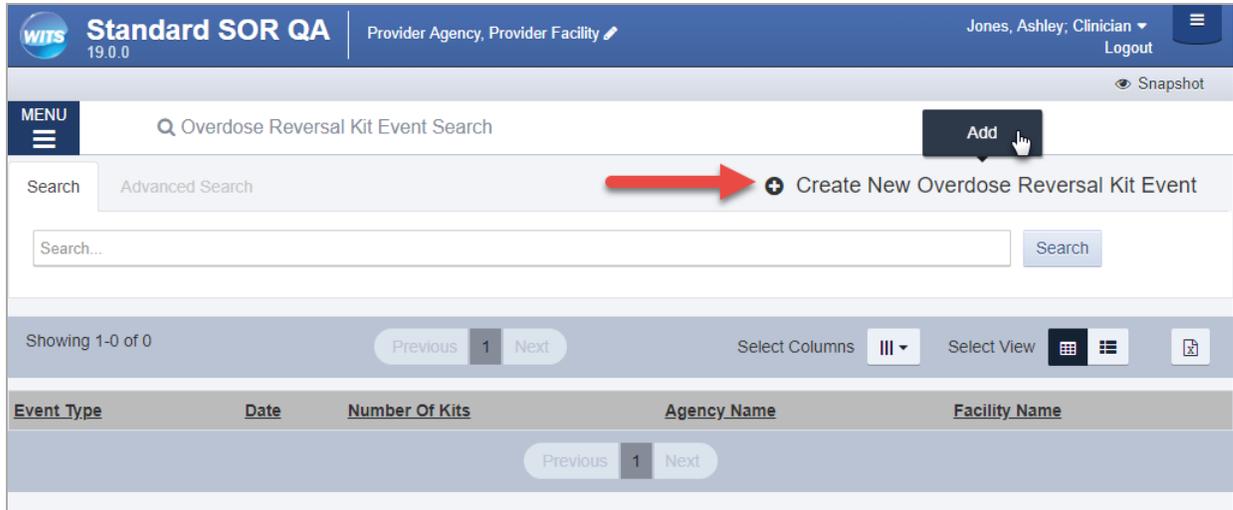
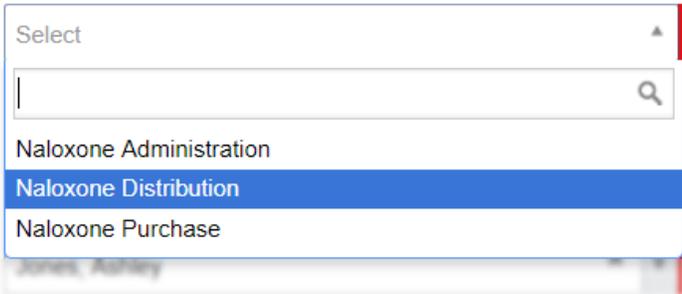


Figure 7-1: Create New Overdose Reversal Kit Event

3. On the **Add Overdose Reversal Kit Event** dialog box, complete the fields as shown in the table below.

Table 7-1: Add Overdose Reversal Kit Event dialog box fields

Field	Description
Agency	Defaults to the current agency name. Note: The selected agency cannot be updated once this dialog box is saved.
Facility	Defaults to the current facility name. Note: The selected facility cannot be updated once this dialog box is saved.
Event Type	Select an event type from the drop-down list. Note: The selected event type cannot be updated once this dialog box is saved. Event Type: 
Date	Defaults to the current date.
Staff Member	Defaults to the current staff member logged in.

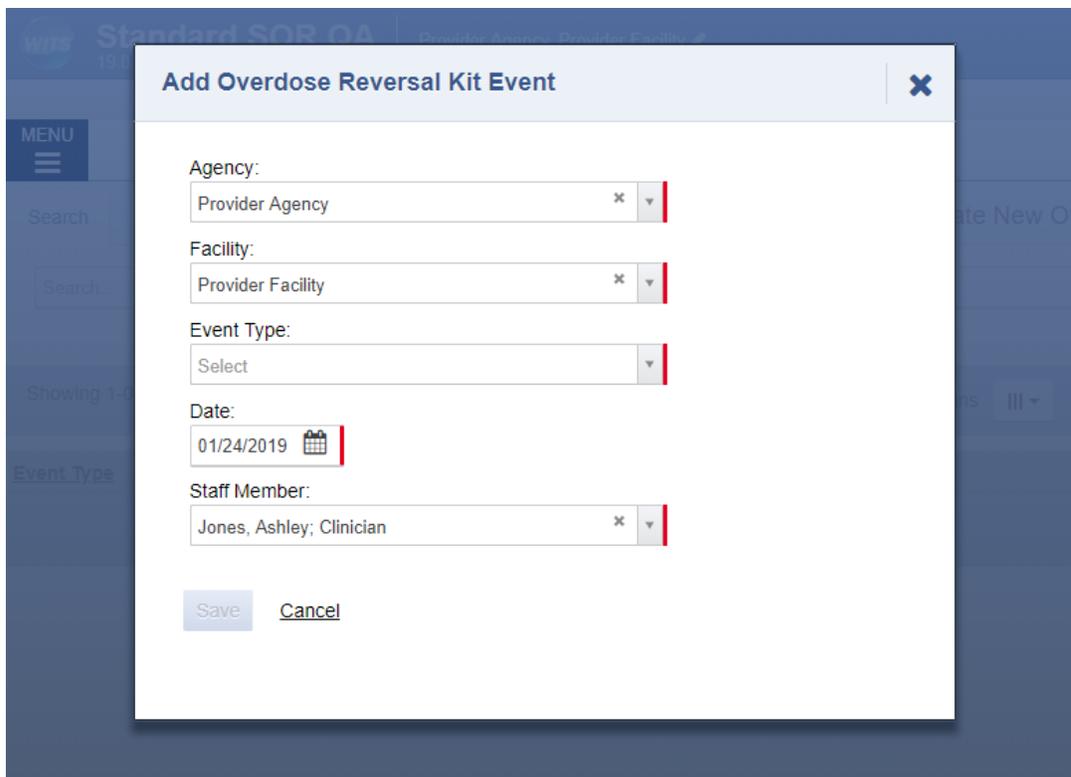


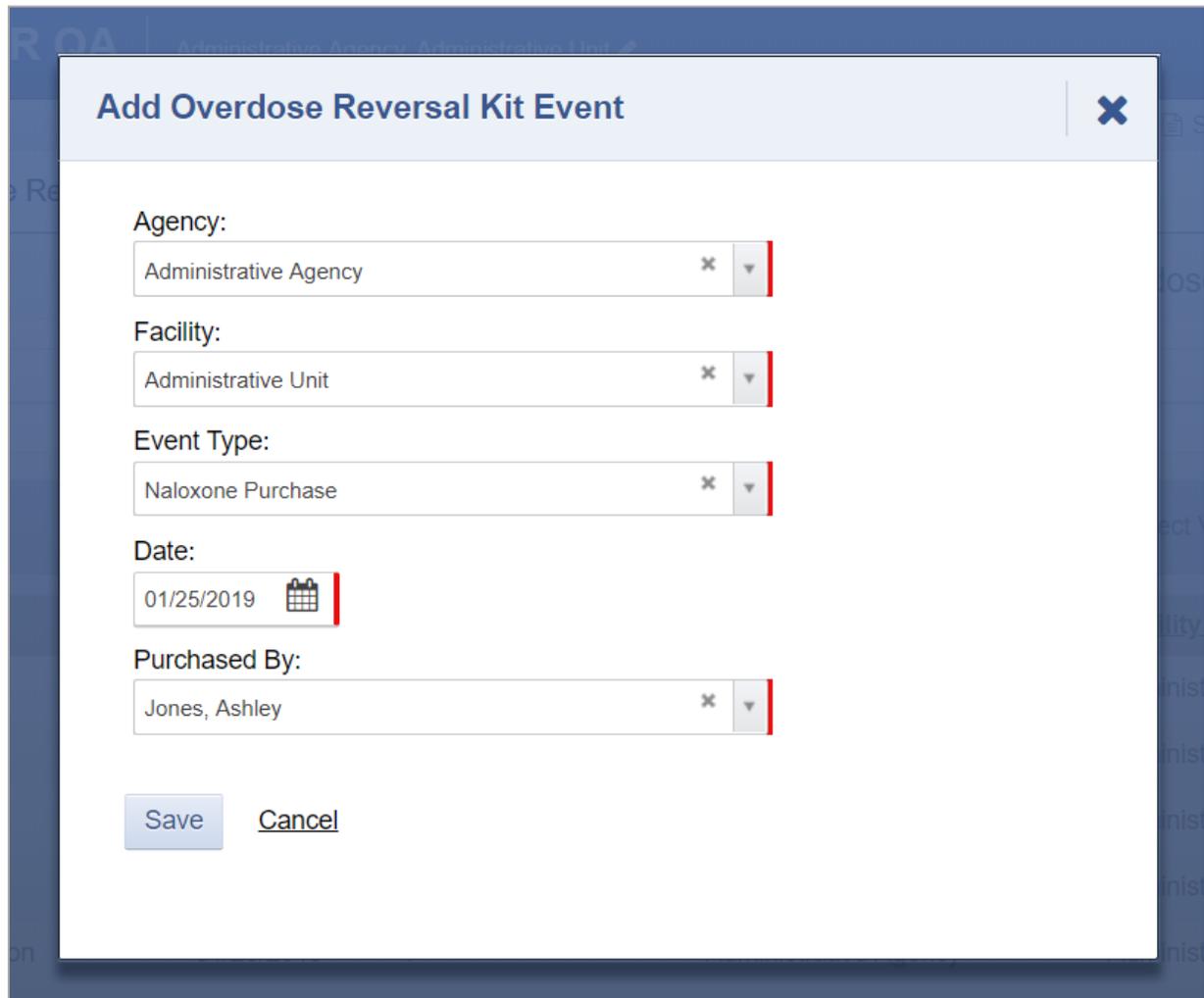
Figure 7-2: Overdose Reversal Kit Event dialog box

4. Click **Save**. This will open the Event Workspace screen.

Naloxone Purchase

To record when Naloxone was purchased, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Purchase** from the drop-down list.



The screenshot shows a dialog box titled "Add Overdose Reversal Kit Event" with a close button (X) in the top right corner. The dialog box contains the following fields:

- Agency:** Administrative Agency
- Facility:** Administrative Unit
- Event Type:** Naloxone Purchase
- Date:** 01/25/2019 (with a calendar icon)
- Purchased By:** Jones, Ashley

At the bottom left of the dialog box, there are two buttons: "Save" and "Cancel".

Figure 7-3: Add Overdose Reversal Kit Event dialog box, Naloxone Purchase

4. Update the other fields as applicable. Click **Save**. This will open the Purchase Event Workspace screen.

Panel: Event

1. On the **Purchase Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

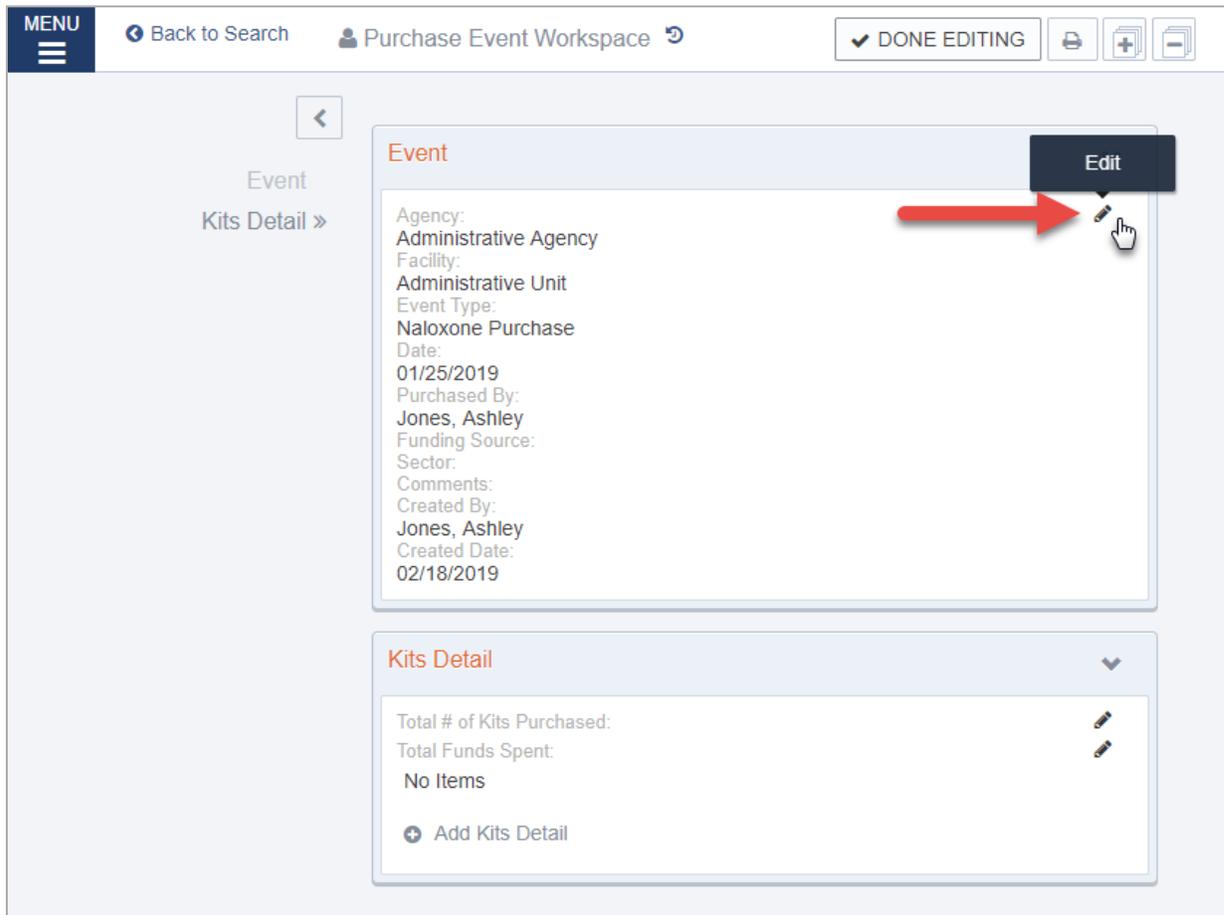


Figure 7-4: Purchase Event, edit Event panel

2. In the **Event** panel, update the fields as shown in the table below.

Table 7-2: Purchase Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Purchase.
Date	Update the date as applicable.
Purchased By	Update the name as applicable.
Funding Source	(Optional) Select the appropriate value from the drop-down list. SOR may be the funding source paying for this event.
Sector	Select one or more sectors from the left box by clicking the name of each sector. If "Other" is selected, complete the required field, Other Description .

Field	Description																																																								
	<div data-bbox="829 243 1455 762"> <p>Sector:</p> <div style="display: flex; justify-content: space-between;"> <input type="text" value=""/> <input type="text" value=""/> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;">Coalitions</td> <td style="width: 5%; text-align: center;">▲</td> <td style="width: 40%; padding: 2px;">Other</td> <td style="width: 5%; text-align: right;">✕</td> </tr> <tr> <td style="padding: 2px;">Criminal Justice</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Emergency Medical Staff</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Family Member</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Fire Fighters</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Law Enforcement</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Military</td> <td style="text-align: center;">▼</td> <td></td> <td></td> </tr> </table> <p>Other Description:</p> <input style="width: 100%; height: 20px;" type="text"/> </div> <p data-bbox="829 779 1455 842">To remove a selected sector, click the 'X' beside the sector's name.</p> <div data-bbox="829 852 1455 1266"> <p>Sector:</p> <div style="display: flex; justify-content: space-between;"> <input type="text" value=""/> <input type="text" value=""/> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;">Emergency Medical Staff</td> <td style="width: 5%; text-align: center;">▲</td> <td style="width: 40%; padding: 2px;">Coalitions</td> <td style="width: 5%; text-align: right;">✕</td> </tr> <tr> <td style="padding: 2px;">Family Member</td> <td></td> <td style="padding: 2px;">Criminal Justice</td> <td style="text-align: right;">✕ </td> </tr> <tr> <td style="padding: 2px;">Fire Fighters</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Law Enforcement</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Military</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Other</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Paramedic</td> <td style="text-align: center;">▼</td> <td></td> <td></td> </tr> </table> </div>	Coalitions	▲	Other	✕	Criminal Justice				Emergency Medical Staff				Family Member				Fire Fighters				Law Enforcement				Military	▼			Emergency Medical Staff	▲	Coalitions	✕	Family Member		Criminal Justice	✕ 	Fire Fighters				Law Enforcement				Military				Other				Paramedic	▼		
Coalitions	▲	Other	✕																																																						
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Law Enforcement																																																									
Military																																																									
Other																																																									
Paramedic	▼																																																								
Comments	(Optional) Type comments about this event as applicable.																																																								
Created By	Read-only field displaying the staff member who created the record.																																																								
Created Date	Read-only field displaying the date the record was created.																																																								

MENU [Back to Search](#) [Purchase Event Workspace](#) ✓ DONE EDITING

Event »
Kits Detail

Event

Agency:
Administrative Agency

Facility:
Administrative Unit

Event Type:
Naloxone Purchase

Date:
01/25/2019

Purchased By:
Jones, Ashley

Funding Source:
SOR

Sector:

<input type="text"/>	<input type="text"/>
Coalitions	
Criminal Justice	
Emergency Medical Staff	
Family Member	
Fire Fighters	
Law Enforcement	
Military	

Comments:

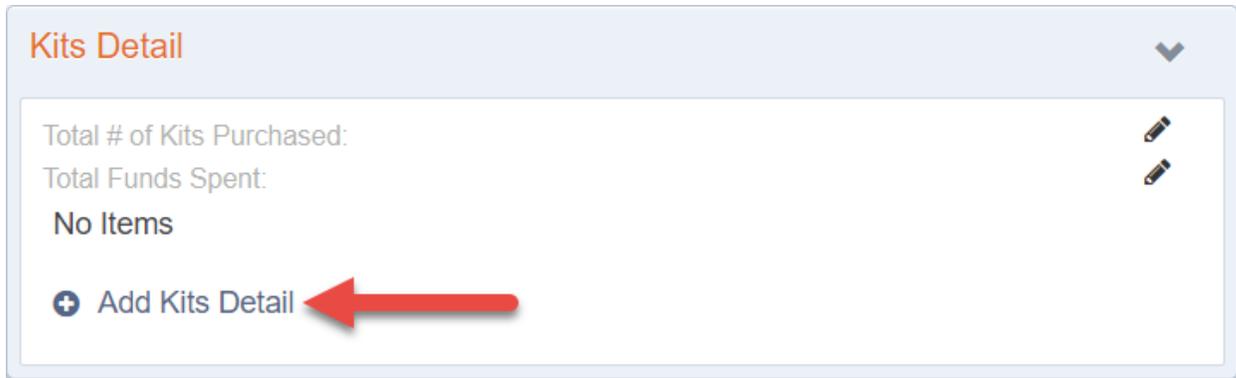
Created By:
Jones, Ashley

Created Date:
01/29/2019

Panel: Kits Detail

Option 1: Add Kit Type, Number, and Cost

1. If you know detailed information about the type(s) of kit(s) purchased, in the **Kits Detail** panel, click **Add Kits Detail**.



2. In the **Kits Detail** panel, complete the fields as shown in the table below.

Table 7-3: Kits Detail fields

Field	Description
Kit Type	Select the type of kit purchased from the drop-down list. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Kit Type:</p> <div style="border: 1px solid #ccc; padding: 2px;"> Select ▲ </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> 🔍 </div> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px;">Auto-injector kits (Kalea/Evzio) <li style="padding: 2px;">Injectable (intramuscular) .4mg/10ml vial kits (Hospira) <li style="padding: 2px;">Injectable (intramuscular) .4mg/1ml vial kits (Mylan or West-Ward) <li style="padding: 2px;">Injectable (intramuscular) 1mg/2ml vial kits (Aurum) <li style="padding: 2px;">Nasal spray kits, 2mg (Adapt/Narcan) <li style="padding: 2px;">Nasal spray kits, 4mg (Adapt/Narcan) <li style="padding: 2px;">Other </div>
Number of Kits	Type an integer.
Cost of Kits	Type an integer (whole numbers).

The screenshot shows a 'Kits Detail' form with a light blue header and a white body. At the top left, the title 'Kits Detail' is displayed in orange. Below the title, there are two summary rows: 'Total # of Kits Purchased:' and 'Total Funds Spent:', each with a pencil icon to its right. The main form area has a dark grey background and contains three input fields: 'Kit Type:' with a dropdown menu showing 'Auto-injector kits (Kalea/Evzio)', 'Number of Kits:' with a text input containing '4', and 'Cost of Kits:' with a text input containing '12000'. At the bottom left of the form area are two buttons: 'Save' and 'Cancel'.

- 3. Click **Save**.
- 4. Continue adding additional kits as needed by clicking Add Kits Detail.

This screenshot shows the 'Kits Detail' form after the first kit has been added. The summary rows now show 'Total # of Kits Purchased: 4' and 'Total Funds Spent: 12000'. The kit details are listed below: 'Kit Type: Auto-injector kits (Kalea/Evzio)', 'Number of Kits: 4', and 'Cost of Kits: 12000'. On the right side of the form, there are three icons: a pencil, another pencil, and a minus sign. At the bottom left, there is a blue button with a plus sign and the text 'Add Kits Detail', which is highlighted by a large red arrow pointing to it from the right.

Figure 7-5: Add additional Kits

As you add various Kit Types, the Number of Kits and Cost of Kits, WITS will automatically add those values and display in the Total fields at the top of the Kits Detail screen.

The screenshot shows the 'Kits Detail' panel with a red box highlighting the total fields. The panel contains the following information:

Field	Value
Total # of Kits Purchased:	14
Total Funds Spent:	13250
Kit Type:	Auto-injector kits (Kalea/Evzio)
Number of Kits:	4
Cost of Kits:	12000
Kit Type:	Injectable (intramuscular) .4mg/1ml vial kits (Mylan or West-Ward)
Number of Kits:	10
Cost of Kits:	1250

At the bottom of the panel, there is a button labeled '+ Add Kits Detail'.

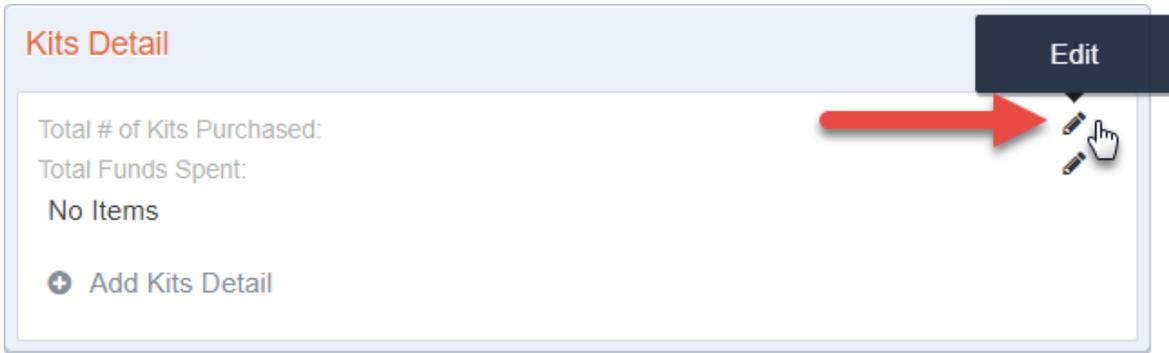
Figure 7-6: Kits Detail panel with Total numbers

Option 2: Add Kit Numbers Only

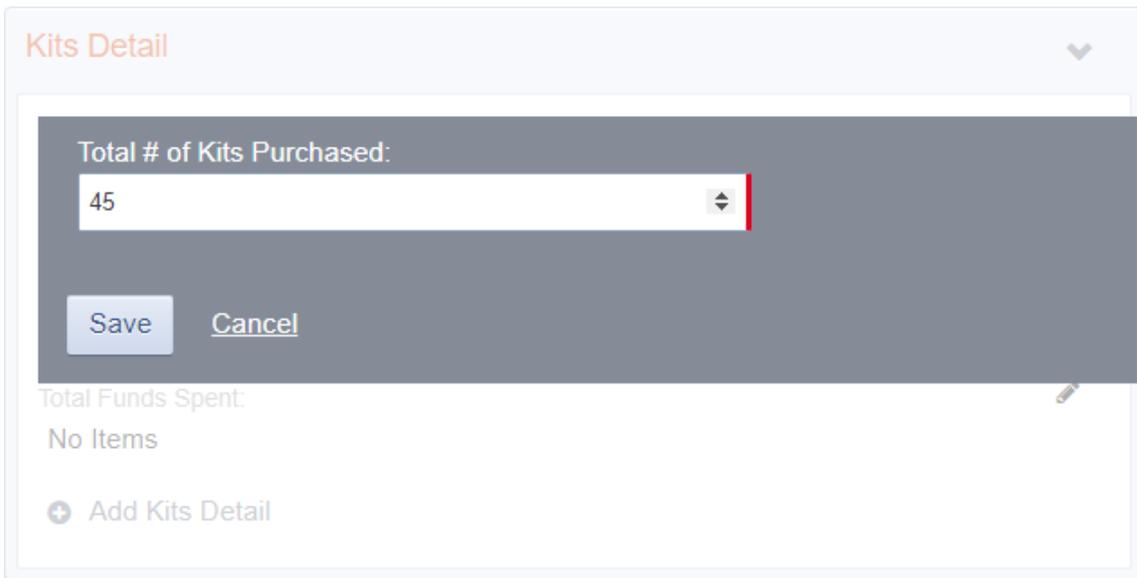
If you do not know the type(s) of kit(s) that were purchased, you may directly enter the **Total # of Kits Purchased** and/or the **Total Funds Spent**.

Note: If you later decide to add details for each kit purchased, then the values previously entered in the fields, **Total # of Kits Purchased** and **Total Funds Spent** will automatically be replaced by the total amounts entered when adding kits detail.

1. To add the total number purchased, in the **Kits Detail** panel, click the top **pencil icon**.



- 2. In the field, **Total # of Kits Purchased**, type an integer.



- 3. Click **Save**.
- 4. To add the total funds spent for this purchase, in the **Kits Detail** panel, click the bottom **pencil icon**.



- 5. In the field, **Total Funds Spent**, type an integer (whole numbers).

Kits Detail 

Total # of Kits Purchased: 

Total Funds Spent:

No Items

 Add Kits Detail

6. Click **Save**.

Additional Steps/Related Information

To update kit information, click the **Edit** icon.

Kits Detail 

Total # of Kits Purchased:
4

Total Funds Spent:
12000

Kit Type:
Auto-injector kits (Kalea/Evzio)

Number of Kits:
4

Cost of Kits:
12000

Edit

 Add Kits Detail

To delete a kit type, click the **Remove** icon and then select either **Yes** or **No**.

Kits Detail 

Total # of Kits Purchased:
4

Total Funds Spent:
12000

Kit Type:
Auto-injector kits (Kalea/Evzio)

Number of Kits:
4

Cost of Kits:
12000

Remove

 Add Kits Detail

Kits Detail 

Total # of Kits Purchased:
4

Total Funds Spent:
12000

Kit Type:
Auto-injector kits (Kalea/Evzio)

Number of Kits:

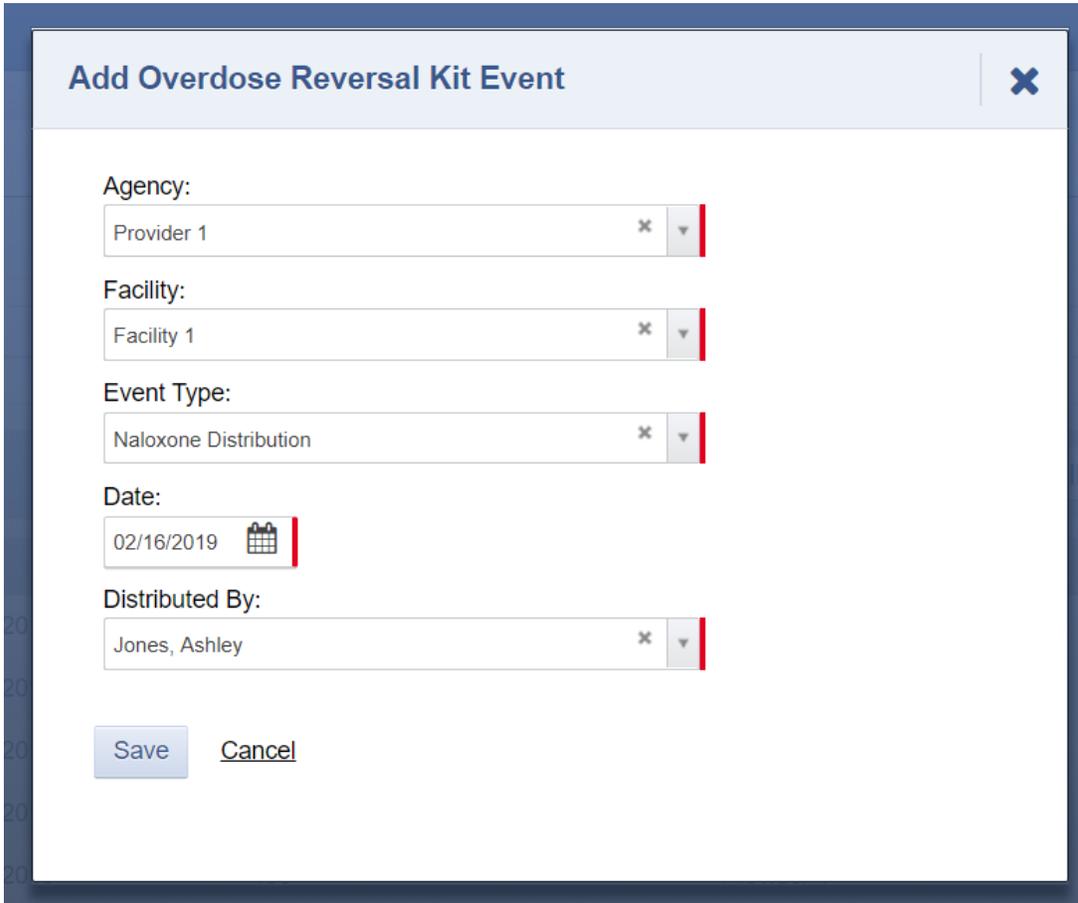
 

Are you sure?

Naloxone Distribution

To record when Naloxone was distributed, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Distribution** from the drop-down list.



The screenshot shows a dialog box titled "Add Overdose Reversal Kit Event" with a close button (X) in the top right corner. The dialog box contains the following fields:

- Agency:** A dropdown menu with "Provider 1" selected.
- Facility:** A dropdown menu with "Facility 1" selected.
- Event Type:** A dropdown menu with "Naloxone Distribution" selected.
- Date:** A date field with "02/16/2019" and a calendar icon.
- Distributed By:** A dropdown menu with "Jones, Ashley" selected.

At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

Figure 7-7: Add Overdose Reversal Kit Event dialog box, Naloxone Distribution

4. Update the other fields as applicable. Click **Save**. This will open the Distribution Event Workspace screen.

Panel: Event

1. On the **Distribution Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

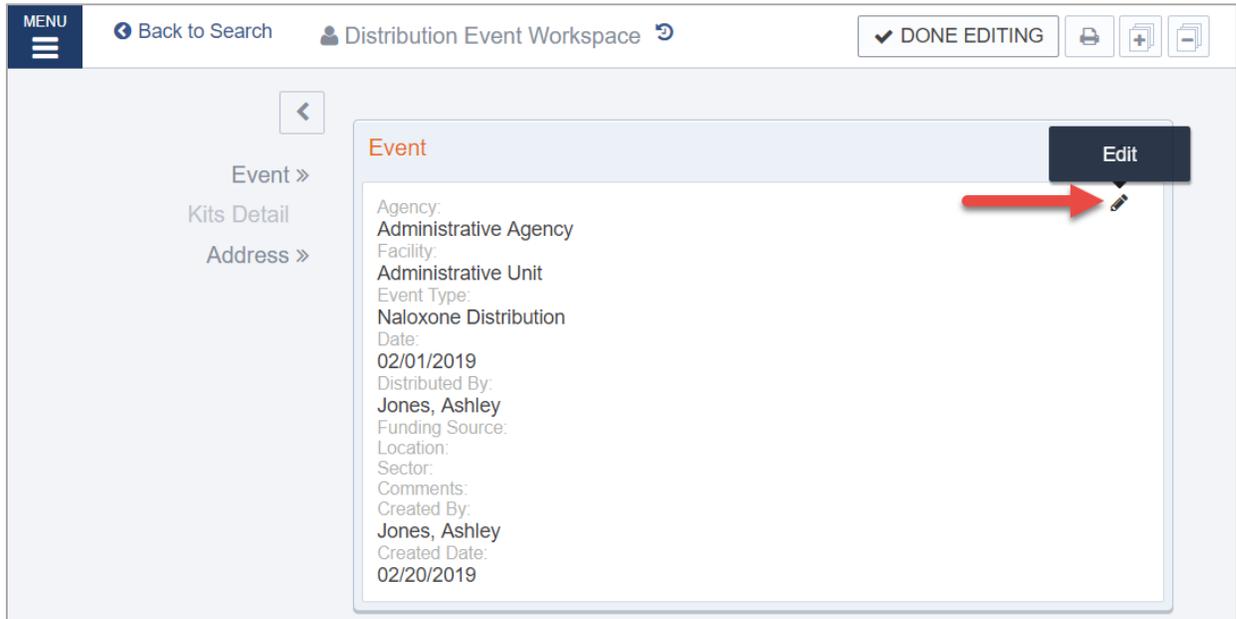


Figure 7-8: Distribution Event, edit Event panel

2. Enter information for this Distribution Event as shown in the table below.

Table 7-4: Distribution Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Distribution.
Date	Update the date as applicable.
Distributed By	Update the name as applicable.
Funding Source	(Optional) Select the funding source from the drop-down list.
Location	(Optional) Enter the location for this distribution event.
Sector	Select the applicable sector(s) for this distribution event.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

3. Click **Save**.

Panel: Kit Detail

Option 1: Add Kit Type

1. If you know the type(s) of kit(s) distributed, in the **Kits Detail** panel, click **Add Kit Detail**.



2. Select the **Kit Type** and the **Number of Kits**.



3. Click **Save**.

Option 2: Add Kit Number Only

If you do not know the detail of kits that were distributed, you may directly enter the **Total # of Kits Distributed**.

Note: If you later decide to add details for the kit(s) distributed, then the number entered in the field, **Total # of Kits Distributed**, will automatically be replaced by the total amount entered for the kit detail.

1. If you only know the number of kits distributed, in the **Kits Detail** panel, click the **pencil icon**.



2. Type the number of kits distributed.



Kits Detail

Total # of Kits Distributed:

Save Cancel

No Items

+ Add Kits Detail

3. Click **Save**.

Panel: Address

1. On the **Distribution Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.



Address

Street 1:
Street 2:
City:
State:
Postal Code:

Edit

2. Complete the address fields and then click **Save**.

Address ▼

Street 1:

Street 2:

City:

State:

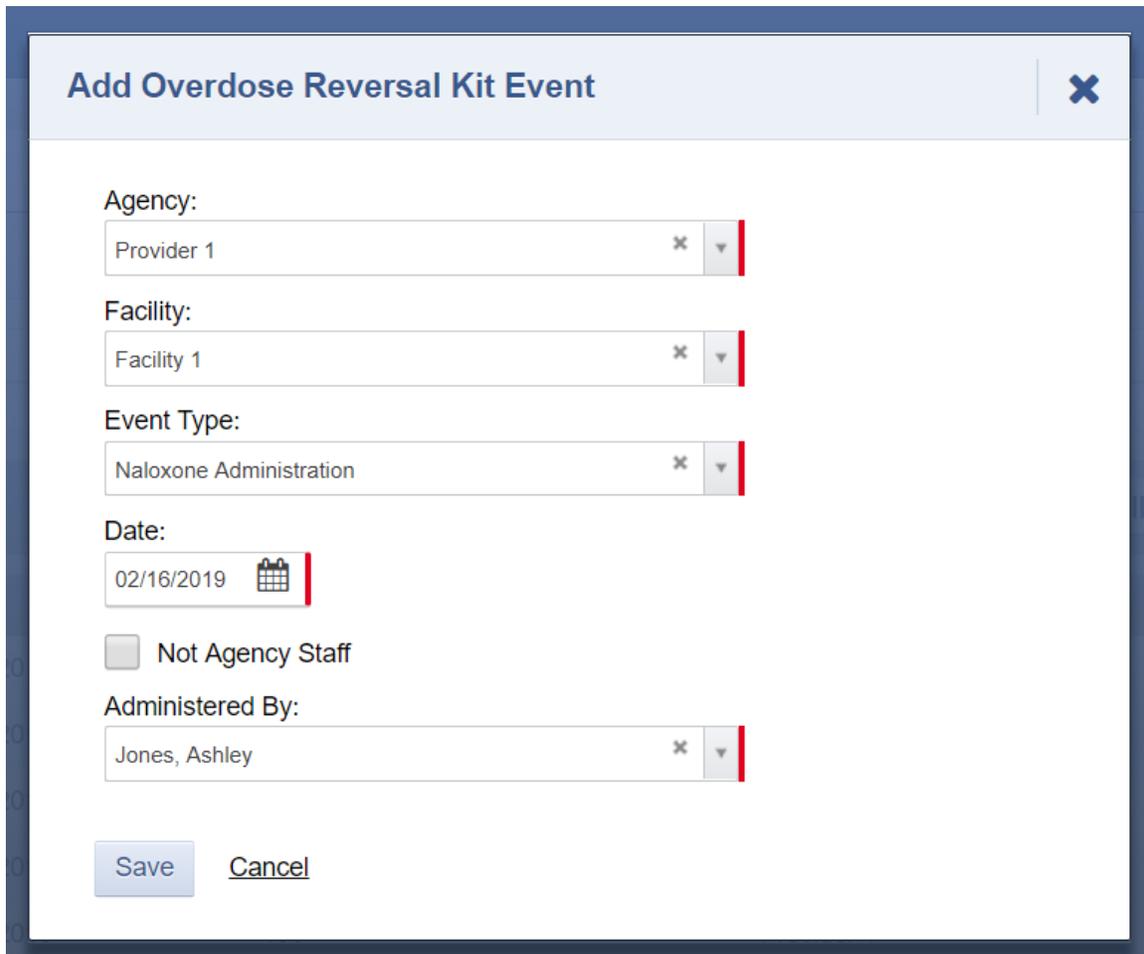
Postal Code:

Information provided by <http://www.usps.com/>

Naloxone Administration

To record when Naloxone was administered, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Administration** from the drop-down list.



The screenshot shows a dialog box titled "Add Overdose Reversal Kit Event" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Agency:** A dropdown menu with "Provider 1" selected.
- Facility:** A dropdown menu with "Facility 1" selected.
- Event Type:** A dropdown menu with "Naloxone Administration" selected.
- Date:** A text input field containing "02/16/2019" and a calendar icon.
- Not Agency Staff**
- Administered By:** A dropdown menu with "Jones, Ashley" selected.
- At the bottom left, there are two buttons: **Save** and **Cancel**.

Figure 7-9: Add Overdose Reversal Kit Event dialog box, Naloxone Administration

4. Update the other fields as applicable. Click **Save**. This will open the Administration Event Workspace screen.

Panel: Event

1. On the **Administration Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.

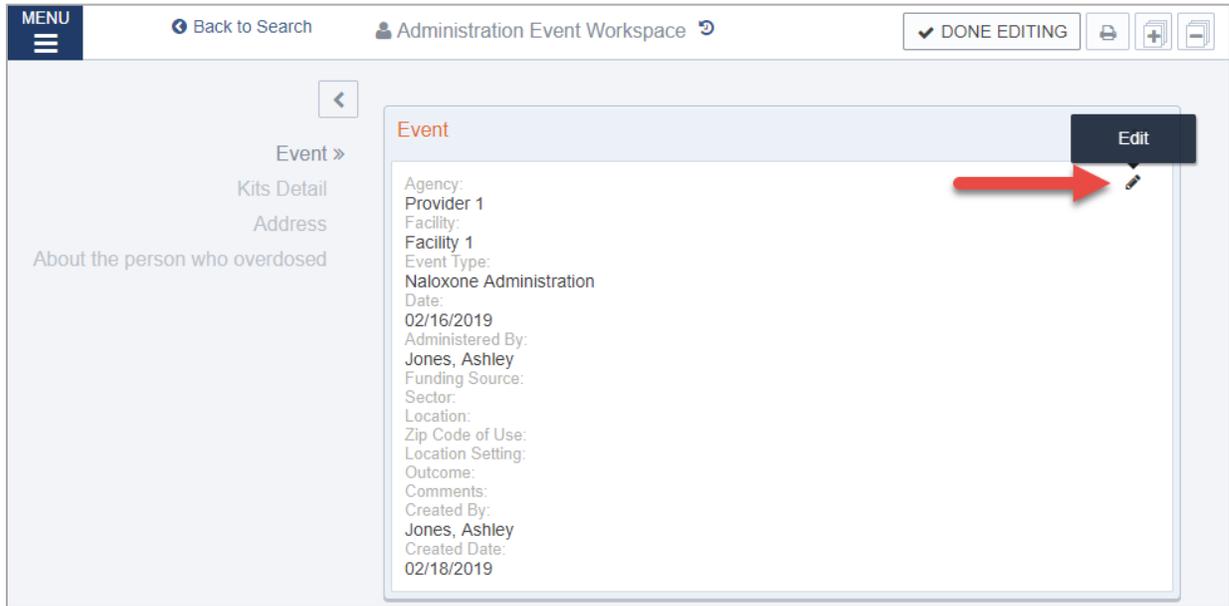


Figure 7-10: Administration Event, edit Event panel

2. Enter information for this Administration Event as shown in the table below.

Table 7-5: Administration Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Administered By	Update the name as applicable.
Funding Source	(Optional) Select the appropriate value from the drop-down list. SOR may be the funding source paying for this event.
Sector	Select one or more sectors from the left box by clicking the name of each sector. If "Other" is selected, complete the required field, Other Description .
Location	(Optional)
Zip Code of Use	(Optional)
Location Setting	Select an option from the drop-down list.
Outcome	Select an option from the drop-down list.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

3. Click **Save**.

Panel: Kit Detail

Option 1: Add Kit Type

1. If you know the type(s) of kit(s) administered, in the **Kit Detail** panel, click **Add Kits Detail**.

The screenshot shows the 'Kits Detail' panel with a dropdown arrow in the top right. Below the title, it says 'Total # of Kits Administered:' followed by 'No Items' and a pencil icon. At the bottom, there is a button labeled '+ Add Kits Detail' with a red arrow pointing to it from the right.

2. Select the **Kit Type** and the **Number of Kits**.

The screenshot shows the 'Kits Detail' panel with a modal form open. The modal has a dark background and contains the following fields: 'Kit Type:' with a dropdown menu showing 'Select', and 'Number of Kits:' with a text input field. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background panel shows 'Total # of Kits Administered:' and a pencil icon.

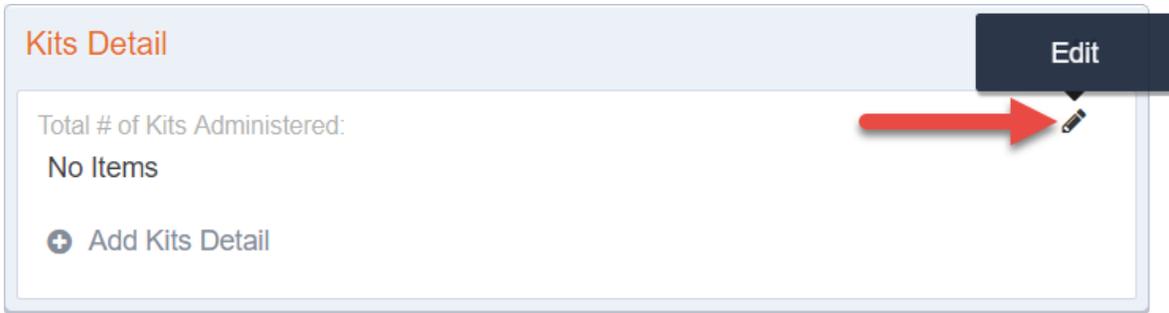
3. Click **Save**.

Option 2: Add Kit Number Only

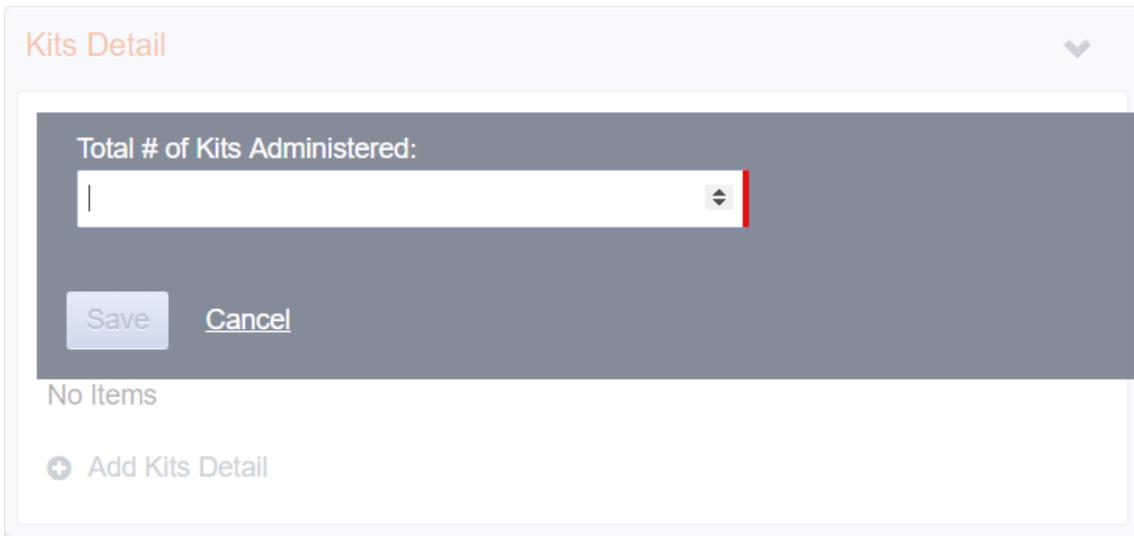
If you do not know the type of kit(s) administered, you may directly enter the **Total # of Kits Administered**.

i Note: If you later decide to add details for the kit(s) administered, then the number entered in the field, **Total # of Kits Administered**, will automatically be replaced by the total amount entered for the kit detail.

1. In the **Kits Detail** panel, click the **pencil icon**.



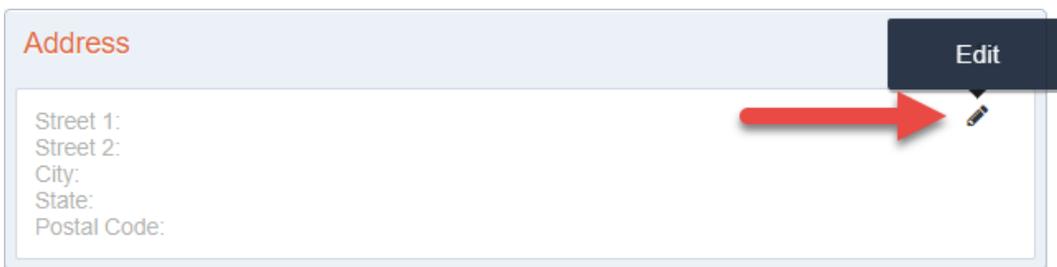
2. Type the number of kits administered.



3. Click **Save**.

Panel: Address

1. On the **Administration Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.



2. Complete the address fields and then click **Save**.

Address
▼

Street 1:

Street 2:

City:

State:

Postal Code:

Save
Cancel

Information provided by <http://www.usps.com/>

Panel: About the person who overdosed

On this panel, enter the Gender, Race, and Age of the person who overdosed.

1. On the **Administration Event Workspace** screen, in the **About the person who overdosed** panel, click the **pencil icon** to edit the information.

About the person who overdosed

Edit

Gender:

Race:

Age:

2. Complete the fields with information about the person who overdosed.

About the person who overdosed

Gender:

Race:

Age:

3. Click **Save**.

Linked Events

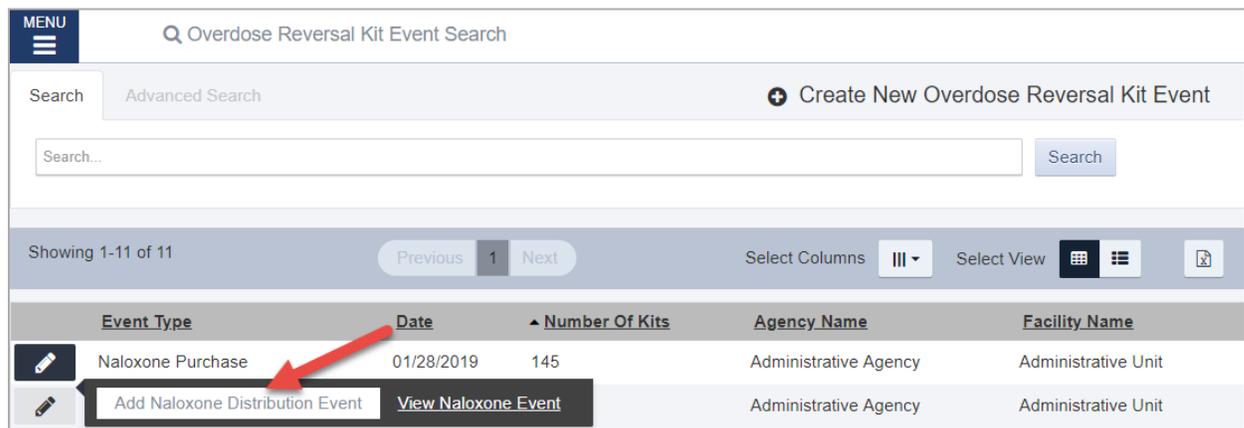
If the same agency has purchased kits and then distributed those kits, those records can be linked together. In addition, an Administration Event can be linked to a Distribution Event.

Note: Linked events allow information to prepopulate fields from one event to the next, and it opens the possibility for reporting across events. However, at this point there are no rules preventing the user from distributing more kits than were purchased, or administering more than was distributed.

Link a Distribution Event with a Purchase Event

To associate a Distribution Event with a Purchase Event, follow the steps below.

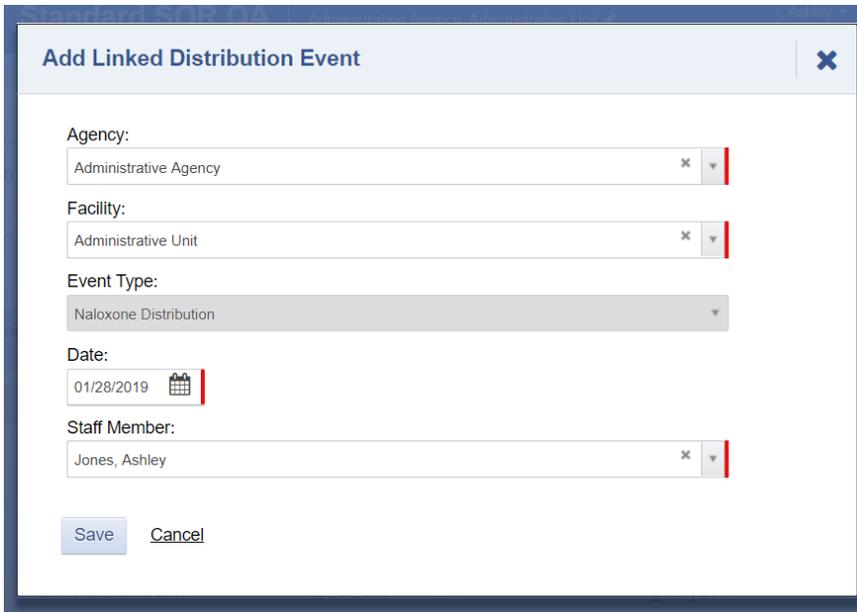
1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Purchase event.
3. Point the pencil icon, and then click **Add Naloxone Distribution Event**.



Event Type	Date	Number Of Kits	Agency Name	Facility Name
Naloxone Purchase	01/28/2019	145	Administrative Agency	Administrative Unit
Add Naloxone Distribution Event	View Naloxone Event		Administrative Agency	Administrative Unit

Figure 7-11: Add Linked Naloxone Distribution Event

4. On the **Add Linked Distribution Event** dialog box, review and update the fields as applicable, then click **Save**. This will open the Distribution Event Workspace screen.



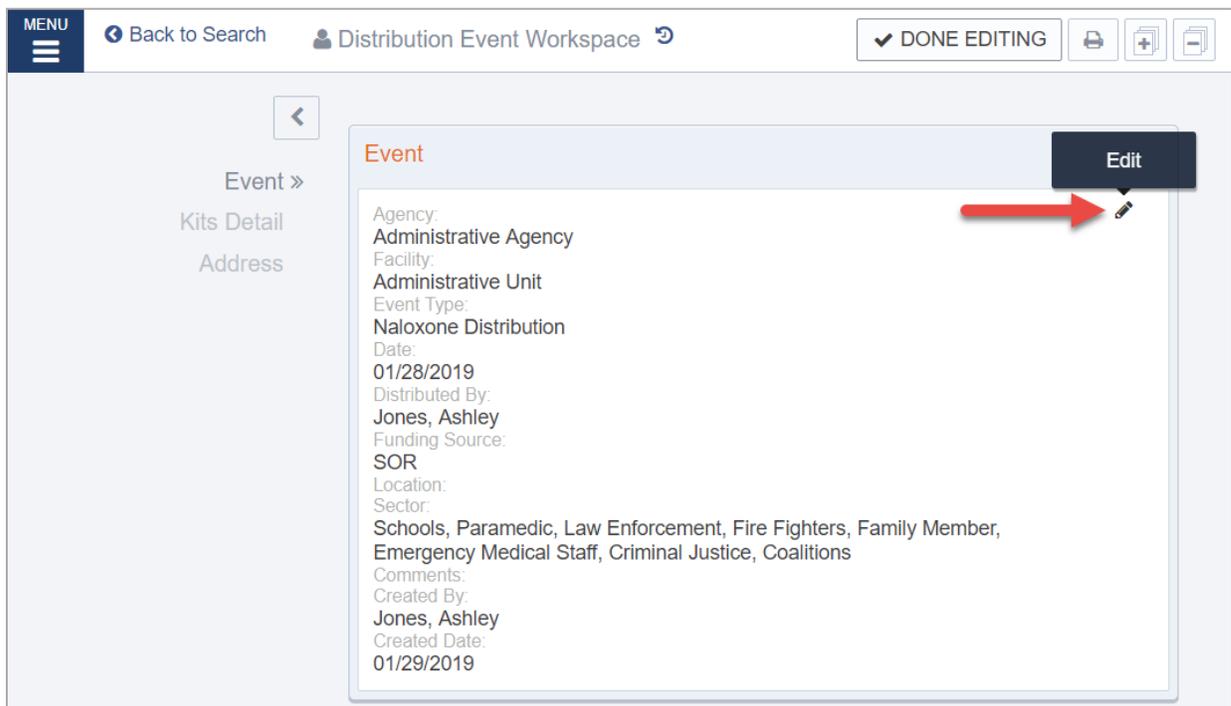
The dialog box is titled "Add Linked Distribution Event" and contains several input fields: Agency (Administrative Agency), Facility (Administrative Unit), Event Type (Naloxone Distribution), Date (01/28/2019), and Staff Member (Jones, Ashley). There are "Save" and "Cancel" buttons at the bottom.

Figure 7-12: Add Linked Distribution Event dialog box

Panel: Event

For linked events, the Distribution Event panel will be prepopulated with information entered on the linked Purchase Event.

1. To update this information, in the **Event** panel, click the **Edit** icon.



The screenshot shows the "Event" panel in the "Distribution Event Workspace". The panel contains the following information: Agency: Administrative Agency; Facility: Administrative Unit; Event Type: Naloxone Distribution; Date: 01/28/2019; Distributed By: Jones, Ashley; Funding Source: SOR; Location: Schools, Paramedic, Law Enforcement, Fire Fighters, Family Member, Emergency Medical Staff, Criminal Justice, Coalitions; Comments: Created By: Jones, Ashley; Created Date: 01/29/2019. An "Edit" button with a pencil icon is located in the top right corner of the panel, with a red arrow pointing to it.

Figure 7-13: Linked Distribution Event, edit Event panel

2. Update the Event fields as applicable.

Table 7-6: Distribution Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field displaying Naloxone Distribution.
Date	Update the date as applicable.
Distributed By	Update the name as applicable.
Funding Source	(Optional) Defaults to the funding source selected on the linked Purchase Event.
Location	(Optional) Enter the location for this distribution event.
Sector	Update the selected sector(s) as applicable for this distribution event.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.

3. Click **Save**.

Panel: Kits Detail

Since this Distribution Event is linked to a specific Purchase Event, the types of kits available to select are linked to those entered for that Purchase Event.

In the following example (shown in the screen captures below), two types of Naloxone kits were bought and recorded on a Purchase Event. By linking to this Purchase Event, the Distribution Event displays those two types of Naloxone kits within the Kit Type drop-down field.

1. To enter information about the kit, click **Add Kits Detail**.



2. On the Kits Detail panel, select the **Kit Type** and then enter the **Number of Kits** administered.

Kits Detail

Total # of Kits Distributed:

Kit Type:

Select

Auto-injector kits (Kalea/Evzio)

Nasal spray kits, 4mg (Adapt/Narcan)

Save Cancel

Kits Detail

Total # of Kits Distributed:

Kit Type:

Auto-injector kits (Kalea/Evzio)

Number of Kits:

5

Save Cancel

3. Click **Save**. Add additional kit types as applicable.

Panel: Address

1. On the **Distribution Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.

Address

Street 1:

Street 2:

City:

State:

Postal Code:

Edit

2. Complete the address fields and then click **Save**.

Address ▼

Street 1:

Street 2:

City:
 Q

State:
 ▼

Postal Code:
 Q

Information provided by <http://www.usps.com/>

Link a Naloxone Administration Event with a Distribution Event

To associate an Administration Event with a Distribution Event, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Distribution event.
3. Point the pencil icon, and then click **Add Naloxone Administration Event**.

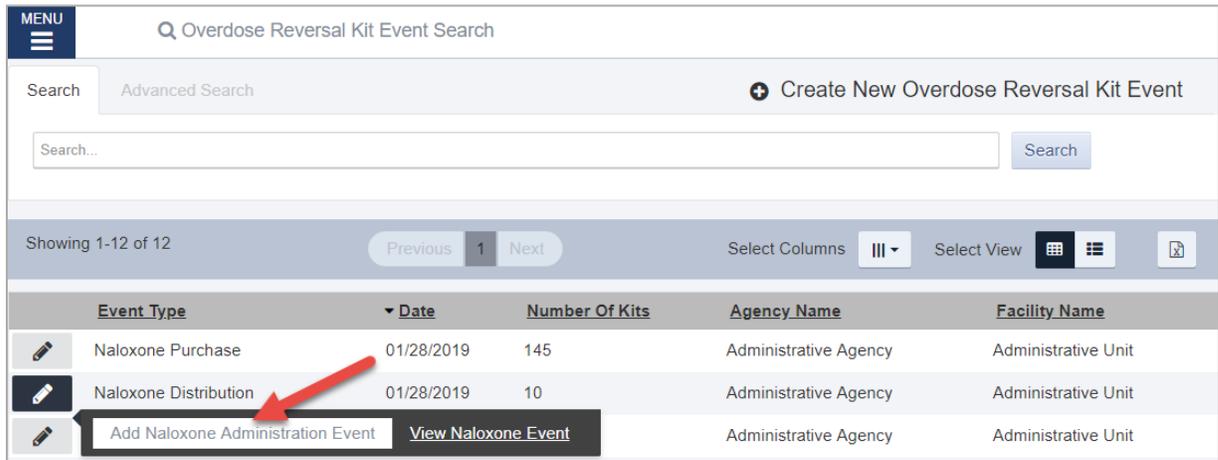


Figure 7-14: Add Naloxone Administration event to a Distribution event

4. On the **Add Linked Administration Event** dialog box, review and update the fields as applicable, and then click **Save**. This will open the Administration Event Workspace screen.

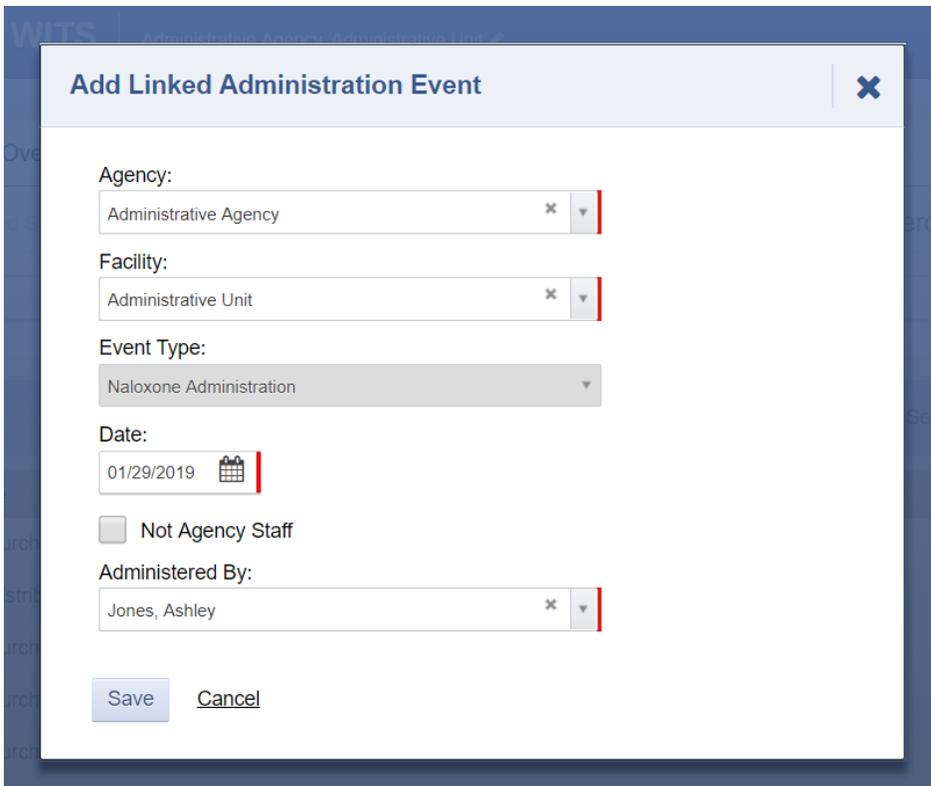


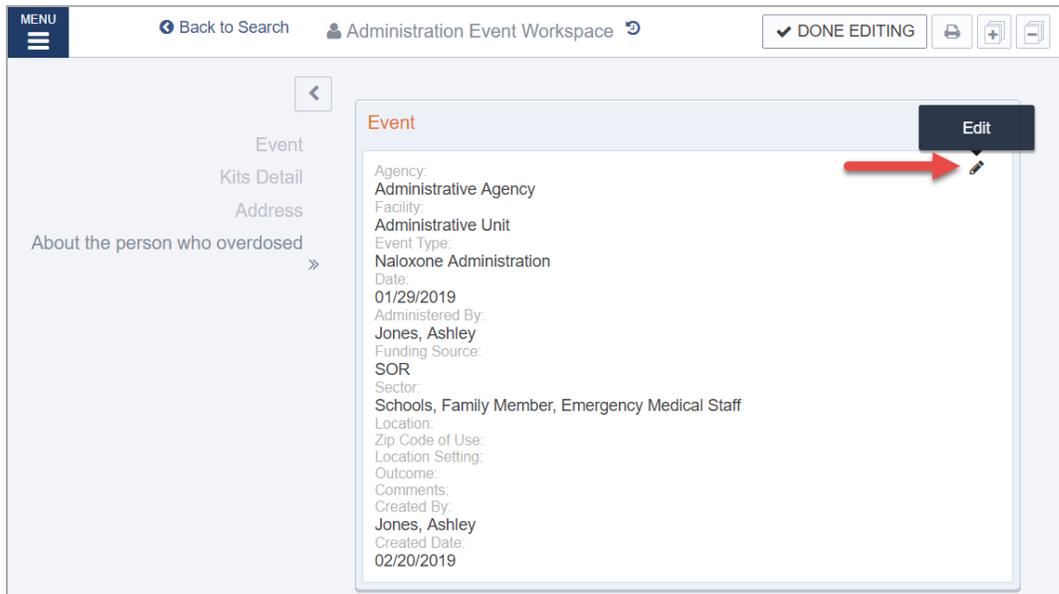
Figure 7-15: Linked Administration Event dialog box

Panel: Event

For linked events, information included in the Administration Event panel will be prepopulated using options selected on the linked Distribution Event.

Note: Linked events allow to prepopulate fields from one event to the next, and it opens the possibility for reporting across events. However, at this point there are no rules preventing the user from distributing more kits than were purchased, or administering more than was distributed.

1. To update event information, in the Event panel, click the **Edit** icon.



7-16: Linked Administration Event, edit Event panel

2. Update the Event fields as applicable, and then click **Save**.

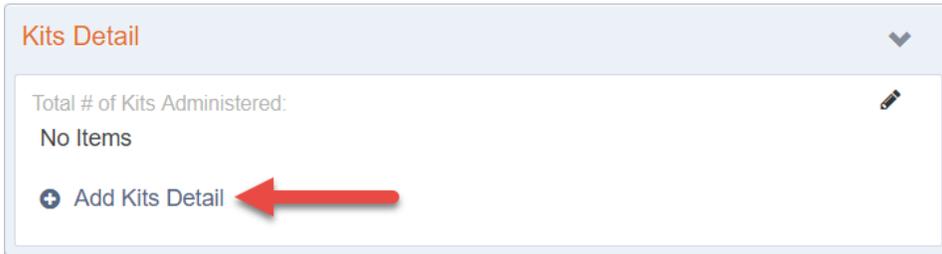
Table 7-7: Administration Event fields

Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Administered By	Update the name as applicable.
Funding Source	(Optional) Defaults to the funding source selected on the linked Distribution Event.
Sector	Update the selected sector(s) as applicable for this administration event.
Location	(Optional)
Zip Code of Use	(Optional)
Location Setting	Select an option from the drop-down list.
Outcome	Select an option from the drop-down list.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.

Field	Description
Created Date	Read-only field displaying the date the record was created.

Panel: Kits Detail

1. To enter information about the kit, click **Add Kits Detail**.



2. On the Kits Detail panel, select the **Kit Type** and then enter the **Number of Kits** administered.



3. Click **Save**.

Panel: Address

1. On the **Administration Event Workspace** screen, in the **Address** panel, click the **pencil icon** to edit the information.

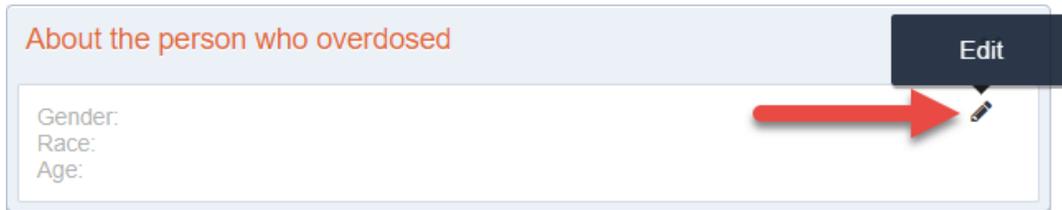


2. Complete the address fields and then click **Save**.

Panel: About the person who overdosed

On this panel, enter the Gender, Race, and Age of the person who overdosed.

1. On the **Administration Event Workspace** screen, in the **About the person who overdosed** panel, click the **pencil icon** to edit the information.



The screenshot shows a panel titled "About the person who overdosed" with a dark blue "Edit" button in the top right corner. Below the title, the fields "Gender:", "Race:", and "Age:" are listed. A red arrow points from the "Edit" button to a pencil icon located at the bottom right of the panel.

2. Complete the fields with information about the person who overdosed, and then click **Save**.



The screenshot shows the "About the person who overdosed" panel with a dropdown arrow in the top right. The panel contains three input fields: "Gender:" with a dropdown menu showing "Select", "Race:" with a dropdown menu showing "Select", and "Age:" with a text input field. At the bottom left, there are "Save" and "Cancel" buttons.

Review an Overdose Reversal Kit

If you need to review and/or edit an event that was previously entered, follow these steps:

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired event to review.
3. Point the pencil icon, and then click **View Naloxone Event**.
4. On the Event Workspace, click the **Edit** button at the top in order to make the workspace editable.
5. Locate the panel(s) to update and click the associated pencil icon to make updates.